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THE DISTANCE EDUCATION ORGANIZATON: CONSIDERATIONS
FOR SUCCESS

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Adult Education

by

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Abstract

Despite the proliferation of distance education at colleges and universities and its increases in student enrollments, experts warn that unless significant changes are made, distance education's future may become threatened (Cavanaugh, 2004; Howard & Schenk, 2004; Porter, 2004; Zemsky & Massy, 2004; Carr, 2001; Carnevale, 2001). These threats directly address and question the effectiveness, need, and in some instances, the continued existence of distance education at the post-secondary level. This study describes the internal characteristics contributing to the sustained operation of a renowned DE organization by examining the organization's social structure. Understanding an organization's social structure facilitates methods to counteract intradepartmental conflict, improve coordination practices and promote effective workflow activities or processes in ways that barrier studies, best practice guidelines and other tools have not, or simply cannot. This study also examines distance education in 2020 including an update on its current statistics, progress and primary research theme. It concludes with a discussion on distance education's most urgent challenges and provides considerations for practice and implications for additional research.

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PREFACE

During the second semester of a doctoral program in higher education, I met Dr. James Duderstadt, President emeritus from the University of Michigan. Dr. Duderstadt, the guest speaker for the course “Administrative Issues in Higher Education,” concluded his presentation and lecture with a brief dialogue hallmarking distance education as the future of higher education. He insisted, “In fifteen years, more students at the University of Michigan will be enrolled via distance education than by traditional residential instruction” (Duderstadt, 1996).

The confidence with which he spoke of distance education and the thought of a technological revolution altering higher education genuinely intrigued me. His remarks mirrored a recent era when the Internet and dot-com phenomenon were virtually exploding in popularity and presumed usefulness. Despite the infinite possibilities of distance education, Dr. Duderstadt’s predictions appeared unrealistic.

The following academic year distance education became the focus of my coursework and research agenda. Eager to become skilled with an emerging technology and determined to grasp the proclaimed educational advantages of distance education, I began working for the University’s Continuing and Distance Education department. My role within the department was to assist faculty members develop online courses and to conduct market research scanning for high demand niche programs. Enlightenment best described my experience.

My professional responsibilities provided exposure to the day-to-day activities of developing distance education programs while the academic coursework provided a comprehensive understanding of distance education research, literature as well as its associated shortcomings. I was particularly interested in delivery media, operational procedures, and eventually, I began to compile data on barriers to distance education (DE), with extensive work

on faculty resistance to DE. After completing the doctoral coursework, two years of assignments and obtaining certification in distance education, I traveled to the University of British Columbia to work with Dr. Tony Bates, a prominent leader in distance education.

Dr. Bates, former Executive Director of Distance Education & Technology managed the development and delivery of distance education courses to more than six thousand students throughout Canada. Under his leadership, I studied the management process of distance education and acquired considerable experience composing intellectual property contracts, acquiring instructional design principles, production and media, marketing, administration, and student support services. With increasing confidence and after becoming more accomplished in effective distance education practices, Dr. Bates suggested I seek more challenging employment opportunities.

I moved from Canada to accept a position at the University of North Carolina at Chapel Hill (UNC). I was hired to provide guidance and leadership for the university's distance education initiative. My primary responsibilities included managing graduate level web-based courses and strengthening the University's distance education curriculum.

During the late nineties, distance education at UNC was uncharted and exciting, but also extremely decentralized. Each college developed and delivered its own DE courses and programs. Absent were university-wide standards for technology or support services, and students occasionally complained about strict course calendars and scheduling limitations. Although our unit provided best practice guidelines and some departments excelled at distance education, the University lacked consistency, and we were unable to convince the university to adopt a coordinated system for delivering DE programs. Consequently, the funding, quality, and success of distance education at UNC became random and unpredictable.

My next position was directing distance education at Texas Southern University. Initially, the Dean prioritized my assignments to address the following challenges: internal competition for resident students, gaps and inconsistencies in governance, minimal faculty participation, financial uncertainty, and to make attempts to improve the institution's overall support of distance education. However, the reality of the position was expressed clearly and directly; I was hired to generate revenue by delivering profitable DE courses and programs.

Additionally, I was responsible for revising the University's strategic plan for distance education. After convening a task force with representation from various entities across the university, we attempted to accomplish one goal, to produce a feasible plan. What ensued was just short of chaos. Faculty insisted on ownership of their courses and negotiated for reduced teaching loads. Deans bargained for university-sponsored mini-grants to increase full-time enrollment figures. Technical support warned that unless staffing increased, they would not meet the demands of service calls and lastly, the university's executive council rejected everyone's requests. The strategic plan was completed and I am certain it has been revised, particularly if referenced for any serious policy related decisions.

In Pennsylvania, British Columbia, North Carolina, and Texas, I observed recurring patterns of how and why distance education was deemed successful and unsuccessful. To date, I have amassed experiences and opinions from working with various institutions among whose strategies I can compare and contrast. The accumulation of these experiences has certainly influenced my perspective on distance education and perhaps generates certain biases, but as a practitioner and researcher, while I support distance education, I also believe it has cause for concern.

These concerns reflect consistent re-emerging issues and potential threats to distance education. These potential threats are identifiable at many institutions and prominent within their DE organizations, including a lack of faculty buy-in, escalating costs, ineffective policies, outdated governance or administrative practices and questionable organizational structures. The question “What works?” still echoes throughout the field and speculation or “It depends” remains a common response. Furthermore, some studies and authors suggest distance education’s failures have been more universal than its successes (Zemsky & Massy, 2004). Although such statements are debatable, they certainly set the stage for this study.

Confusing, yet accurate is the fact that concurrently, distance education is successful, failing, changing and still developing, depending on a number of circumstances. Why? What causes these variations in outcomes and how can they be controlled or managed? This study attempts to respond in part to these types of questions. Therefore, the impetus for this study and its primary objective pertains to reducing threats against DE organizations and improving organizational performance by exploring an entity that significantly affects outcomes – the social structure of the DE organization.

ACKNOWLEDGEMENTS

For quite some time I contemplated how this section might read. With each passing year, an accumulation of names, faces and reasons prompted revision and addition to this section. Some who began this journey with me are no longer close by, but I thank you and I apologize.

For others, your support, encouragement and sacrifices remain embedded in my conscience. I am grateful. On many occasions I produced pages of names describing your specific acts and how those acts contributed to the completion of this project -it read awkwardly, but I have not forgotten you.

How then, can I express my appreciation to you, for you and with you? Each of you is worthy of individual praise and acknowledgement and I wonder if I can repay you for what you have given me. Understand that I will exhaust my efforts trying.

While I'm not sure what lies ahead, Pennsylvania, Virginia, Maryland, Georgia, British Columbia, California, Texas, Michigan, Virgin Island, Colorado, Tennessee, and Wisconsin we did it.

And to North Carolina, my home, my family - Yes, I am the product of my environment, thank you so much. Finally, whether at my apex or scaling the substructure, there exist two people I must recognize. Without you both, your continuous giving, your concern, your stability, unconditional backing and concept of family; this project would not have been accomplished. For my parents, Mr. Anthony Williams Sr. and Mrs. Cynthia Williams- with love.

CHAPTER I

Introduction

The advent of advanced technologies through the conduits of the Internet and digital media resurrects distance education into a valuable commodity, particularly within higher education institutions. Distance education, a mainstay in higher education, no longer faces the question of whether or not it should become embraced but rather, how can it become better utilized as a teaching and learning agent. Its concepts, functionality and e-capabilities continuously spawn radical ideas of revolution and educational transformation. Distance education inspires thoughts ranging from a three-dimensional virtual professor presiding over a classroom to the demise of the traditional university. While such bold predictions have yet to occur, distance education generates fundamental changes and new expectations for colleges and universities.

Distance education (DE), a broad term representing online education and more, receives considerable attention as college administrators, faculty and students perceive value in its capabilities. The value and benefits associated with distance education are noteworthy and generally entail the following:

- Adaptability - For students, learning becomes customized, self-paced, and investigative, a shift emphasizing learner-centered approaches;
- Convenience – The ability and flexibility to deliver and receive education anytime and anywhere via computer and the Internet; and
- Profit – For universities, the lure of sharing an estimated \$53.3 billion market (Zemsky & Massy, 2004).

The rise and popularity of distance education is attributed to many factors, but arguably none quite as significant as three trends. First, the severe and steady reduction in federal and state appropriations forces institutions to adapt to shrinking resources and adjust their expenditures

(Johnson, 2003). Secondly, a mistaken assurance quickly spread — a declaration that distance education would become an institution’s “cash cow” and lastly, increased student demand coupled with the utility and ease of newer technology positioned distance education to appear effortless and desirable. These three trends in concert with other forces compelled higher education to rethink its conventional ways of conducting business and as a result, institutions responded with a surge in DE courses and programs (Carr-Chellman, 2005).

Now, distance education appears to be a coveted commodity, so much that it is labeled a “growth industry ...with Americans spending over one-half of one trillion dollars on it annually” (Shea & Boser, 2001, p. 120). Through the first quarter of 2004, industry surveys charted the rising demand for online programs and indicated approximately 80% of all colleges and universities offer some form of distance education (Primary Research Group, 2004). As more DE courses and programs are developed, enrollment figures continue to escalate into the millions while the median cost to develop online courses has been drastically reduced. Although the costs associated with course development can range from \$3,000 to \$25,000; the median cost remains more manageable than years past when course development easily exceeded several hundred thousand dollars (Primary Research Group, 2001; 2004). Distance education appears to be thriving and experiencing overwhelming success however, national reports, research studies and industry surveys are not always indicative of the entire field.

The Problem

Despite the proliferation of distance education at colleges and universities and its increases in student enrollments, experts warn that unless significant changes are made, distance education’s future may become threatened (Cavanaugh, 2004; Howard & Schenk, 2004; Porter, 2004; Zemsky & Massy, 2004; Carr, 2001; Carnevale, 2001). These threats directly address and

question the effectiveness, need, and in some instances, the continued existence of distance education at the postsecondary level (Monolescu, Schifter, & Greenwood, 2004).

Suggesting distance education is threatened may appear surprising considering its impressive enrollment statistics and the success of some DE organizations like the University of Phoenix and the University of Central Florida. However, a comprehensive review of distance education literature reveals a different perspective, one identifying various threats and challenges that remain in the national spotlight. Frequently, these threats are evidenced in recurring headlines and associated with titles that read, ‘failure’, ‘closing’ and ‘restructuring’. Obviously, these terms invoke apprehension but more disturbingly, they illuminate the alarming number of DE organizations that have either shut down or are in desperate need of immediate guidance.

According to the National Education Association Research Center, “large scale distance education efforts found many ways to fail” and more unsettling, within the past few years, myriads of DE organizations have restructured their initiatives, changed their mission or have completely gone out of business (Wilner & Lee, 2002). NYUonline, California Virtual University and several other distance education organizations closed (Carson, 2001). Following the same trend, Temple University, Cornell University, Princeton University, Columbia University and other renowned universities have eliminated distance education partnerships or have amended their programs. Causes for these developments are varied, but surprisingly, insufficient funding has not always proven to be an essential factor.

Twenty million dollars was not enough to save the United States Open University (Arnone, 2002). After three years, \$62.8 million and nine hundred students, UK eUniversities Worldwide called it quits (Carnevale, 2004). Few DE endeavors are protected; even partnerships are collapsing. The University of Michigan and the University of Toronto both decided to

reorganize their priorities and pulled out of a collaborative distance education venture (Maslen, 2001). These “closures, reorganizations, and mergers within units that manage distance education are having a devastating effect” (Pittman, 2003, p. 32) and these examples do not include employee layoffs, or the exorbitant number of independent programs and online courses that no longer exist.

Resembling aspects of the dot-com meltdown, it appears the promising benefits and lucrative expectations for distance education have not come to fruition for many institutions. In fact, The Learning Alliance recently completed a report citing distance education as a thwarted innovation (Zemsky & Massy, 2004). The report claims that,

The rush to e-learning produced more capacity than any rational analysis would have said was needed... the boom-bust cycle in e-learning stemmed from an attempt to compress the process of innovation itself...entrepreneurs’ enthusiasm produced too many new ventures pushing too many untested products – products that, in their initial form, turned out not to deliver as much value as promised...The hard fact is that e-learning took off before people really knew how to use it (Zemsky & Massy, 2004, p. iii).

Certainly, dissenting opinions exist (Twigg, 2004), but in defense of these comments, some practitioners argue that failing at distance education, although not desired, should be expected. They compare the many difficulties of distance education to most new innovations and suggest a certain learning curve or shakeout is normal and anticipated. In reality, distance education is no longer a new innovation. Distance education continues to mature as a field, but the closures, threats and other perils of DE are not likely products of immature development.

Distance education’s challenges extend well beyond learning curves. A more accurate statement might reflect that colleges and universities have undoubtedly welcomed distance education, but “most are not making the changes necessary to maximize the effectiveness and efficiency of online learning” (Howard, Schenk & Discenza, 2004, p.vi). Accordingly, a few obvious questions resonate. How can DE organizations improve? Where do institutions turn for

help with distance education? What minimizes failure in DE organizations and how have organizations attempted to resolve problems and threats?

Barrier Studies and Best Practice Guidelines

The field's response to failing, closing, and restructuring DE organizations can be as varied as its causes, but often, academician's and practitioner's answer to threats are found in two sources: barriers to success studies and best practices guidelines. Barrier studies expose obstacles and record problems that may potentially affect distance education organizations (Muilenburge & Berge, 2001; Dickinson et al., 1999; and Rockwell et al., 1999; and Yap, 1996). Essentially, barrier studies advise the field on what to '*look out for*' as well as identify the major impediments to successful distance education.

Barrier studies benefit the field in a number of ways. First, they identify trends and issues consistently stalling, hindering or altering the progress of various DE organizations. The identification of barriers may prove helpful because it potentially forewarns administrators and practitioners against costly mistakes and alerts them to common and consistent problem areas. Secondly, a barrier study can highlight reactions, responses, or lessons learned from multiple perspectives including students, faculty, administrators, practitioners and literary sources. These multiple perspectives provide decision makers with a snapshot and general understanding of impediment issues, which may ultimately assist them to minimize potential obstacles. For example, there are barrier studies that identify various reactions to intellectual property agreements or identify the major areas of concern, but often, the information and the barrier study remains exceedingly inadequate for resolving organizational closure and restructuring concerns (Dickinson et al., 1999).

Best Practice Guidelines

Best practice guidelines provide another means to address threats and failures associated with distance education. Best practice guidelines were developed to provide strategies and useful principles promoting successful and sustainable distance education courses, programs, and organizations. Contained within many of these guidelines are approximately six key areas that consistently require guidance: planning, administration, curriculum and instruction, faculty support, student support, and technology and assessment (Moore & Anderson, 2003).

Throughout the field of distance education, best practices are widely accepted and helpful. Primarily, best practices are concerned with two goals: 1) To promote a repeatable standard of quality; and 2) To offer proven methods for developing and sustaining distance education practices (Levine & Sun, 2003). Similar to the criticisms on barrier studies, best practice guidelines have shortcomings as well. For instance, some best practice guidelines are written with clear and exact prose that explicitly describe the context, intentions and methods used to develop the guidelines. Disappointingly, the more valuable section, the recommendation portion is more often delivered with bulleted points, while most narrative prose becomes condensed, choppy and fragmented. Using the widely-cited best practice guidelines developed by the Western Cooperative for Educational Telecommunications (WCET) as an example, the following DE recommendations were released in regard to Institutional Context and Commitment:

- Maintain appropriate academic oversight
- Contract for products and outsourced services
- Facilitate the associated instructional and technical support relationships (WCET, 1995).

Although this source is dated, these statements reflect current best practice guidelines, but they are neither detailed, nor strategic enough for administrators to make informed decisions

regarding policy, strategy or to significantly improve their DE organization. The primary purposes of best practice guidelines and barrier studies involve assembling procedures to ensure effective and successful distance education; yet, DE organizations continue to fail, restructure and close.

A Void in the Literature

Even though barrier studies and best practice guidelines are respected as constructive tools for distance education, these documents have not adequately responded to DE's failures, closings, and restructurings. Barrier studies identify obstacles well, while best practices suggest methods of enhancing quality; but neither serve or address the DE organization holistically. I apply holistic to reference a system-wide approach to reducing threats against the DE organization or the ability to examine distance education from a macro-organizational perspective.

As an analogy, imagine a person not feeling well. He complains about headaches, fatigue, a consistent cough and congestion. After a several weeks and worsening ailments, he looks for relief in a barrier study or a best practice guideline. Undoubtedly, the documents are informative. They explain in detail that 800 mg of aspirin cures aches, that eight hours of sleep combats fatigue, and a cough suppressant can relieve a persistent cough. However, the documents are not capable of diagnosing the cumulative affect of the symptoms.

Without a holistic understanding of the human body and its immune system, the ailing person may begin administering treatment for cold-like symptoms, but may actually have bronchitis, cancer or perhaps HIV. The point here is that barrier studies and best practices address symptoms, but diagnosis, treatments and cures evolve from a more comprehensive understanding of the respiratory and immune systems, not individual or isolated symptoms; and

for DE organizations, a similar level of understanding about the entire organization is also necessary.

In agreement, Michael Moore, a distance education pioneer and editor of *The American Journal of Distance Education*, revealed major impediments to distance education's development. As early as 1994, Moore asserted the problems with distance education were not the result of technology or pedagogy: "We have plenty of technology, and we have a fair knowledge about how to use it." Instead he suggests, "The major problems are associated with organizational change... and change in administrative structures. Here we desperately need all the ideas and all the leadership that can be assembled" (Moore, 1994, p. 4). Additionally, Marshal and Gregor (2003) in their discussion on effective distance education and the implications for higher education, emphasize that it "is necessary to look at organization structures and work groups, including organizational roles, workgroup dynamics, and communication," all of which "are needed to allow a university to exist and prosper" (p.123).

Following a similar path, this study examines the collective parts of the DE organization. The study investigates relationships among personnel, organizational structure and processes that help the DE organization operate more successfully. Defining success is often subjective, but for this study success is guided by four approaches developed to evaluate organizational effectiveness. Evaluating organizational effectiveness entails goal accomplishment, system resources, strategic constituencies, and internal processes and operations (Cameron, 1987). This study focuses primarily on internal processes and operations.

The primary concept for this study suggests that improving organizations can result from a better understanding of how the organizational components (people, departments and activities) relate to the organization's goals or expected outcomes (Gagne, 1995; Greenberg & Baron, 2003;

Bowditch & Buono, 1997). By examining and understanding how the parts and processes of the entire DE organization function, not merely items in isolation, DE decision makers may become better prepared to address failure as well as a multitude of other concerns.

To facilitate a more comprehensive understanding of how organizations operate, organizational theory offers a number of frameworks and perspectives. Within these perspectives topics such as organizational performance, development and behavior provide a means to analyze individual and group behaviors and processes within organizations (Hatch, 1997; Pfeffer, 1997; Berger & Luckmann, 1967). Sociologists refer to these behavior and process aspects within the organization as *social structure* and it serves as a major emphasis for this study.

Purpose Statement

This study explores the social structure of the Penn State World Campus. The study describes the internal characteristics contributing to the sustained operation of a renowned DE organization. Understanding an organization's social structure facilitates methods to counteract intradepartmental conflict, improve coordination practices and promote effective workflow activities or processes in ways that barrier studies, best practice guidelines and other tools have not, or simply cannot.

Essentially, this examination of social structure reveals the organization's ways of conducting business and its specific methods for creating, developing and delivering online programs. Accordingly, formal organizational subunits and informal groups are identified, hierarchical relationships and processes are explained and mechanisms of control are described. These descriptions are employed in an effort to demonstrate the Penn State World Campus process, structure and means for achieving organizational outcomes.

Social Structure

To understand how organizations function you must know about their structural elements, their basic building blocks (Greenberg, 2005, p. 423).

Social structure refers to the relationships and formal configuration between an organization's individuals and groups with respect to the allocation of tasks, responsibilities, and authority (Scott, 2001; Pfeffer, 1997, Hatch, 1997). In its simplest form, social structure can be perceived as the way in which participants, technology, environment and goals are combined and coordinated to achieve organizational outcomes. Ideally, understanding social structure can help explain or orchestrate ways to enhance organizational effectiveness.

To illustrate the role of social structure, Scott (2003) first describes common features of organizations.

All organizations confront a number of common problems: all must define and redefine their objectives; induce participants to contribute services; control and coordinate these contributions; resources must be garnered from the environment and products or services dispensed; participants must be selected, trained, and replaced; and some sort of working accommodation with the neighbors must be achieved (Scott, 2003, p. 11).

Social structure essentially represents the patterned behaviors used to address the above passage. By understanding the social structure of organizations, decision-makers may improve the way 'things get done' in their respective organizations. Additionally, the examination of social structure enables an understanding of a process, eliciting important descriptions of the organization's informal behavior, internal coordinating mechanisms, authority levels, divisions of labor, communication practices, work processes, subunits, and formal rules and procedures. Through a better understanding of social structure, practitioners may become better equipped to recognize, anticipate and respond to potential threats against the success and sustainability of DE organizations.

Conversely, two concerns exist. First, many DE administrators seem completely oblivious to or underestimate the value of social structures. Secondly, if aware of its value, many decision-makers still have limited knowledge on how to appropriately address their organization's social structures, therefore restricting their ability to reduce threats to the DE organization (Saba, 2004; Davis, 2004). Social structures are not commonly a high priority agenda item when discussing distance education, but their role remains paramount.

Davis (2004) echoes the same sentiments, adding that a more deliberate focus on building an online infrastructure is now imperative. As an exaggerated example, assume that in traditional institutions faculty members teach, students learn, and administrators govern. Each of these groups is not interested in every aspect of higher education or the relationships that create and sustain the university. In traditional institutions each constituency is not required to know every detail, "but in distance education, understanding how the entire system of course development and delivery occurs, and how these systems link to services and other components are vital aspects of ensuring effectiveness and quality" (Davis, 2004, p.97-98).

Theoretical Framework

Scott (1992) states that not all investigators are seeking answers to the same question. There are levels of analysis from which the phenomenon will be examined and explained. This study's theoretical framework examines behavior patterns, "structural features and social process[es] that characterize organizations and their subdivisions" (Scott, 1992, p. 15). This framework incorporates theories and concepts derived primarily from organizational theory with specific emphasis on Scott's (2003) and Pfeffer's (1997) work on social structure and Greenberg's (2005) concepts of organizational design. The simultaneous and collective focus on an organization's people, departments, divisions and processes provides helpful insights for

better coordination and integration among organizational activities. Organizational theory establishes that this coordination and integration of work activities acts as one of the primary catalysts for developing effective organizations (Scott, 2003; Senge, 2002; Scott, 2001; Hatch, 1997).

From an open system perspective (Scott, 2003), this study focuses on the intraorganizational level as opposed to the interorganizational level. “The intraorganizational level refers to the internal interactions and characteristics of an organization...which include formal and informal interactions among employees, internal organizational design, and methods of organizational control” (Jaffee, 2001, p. 20). Interorganizational matters focus more on external interactions among and between organizations and their environment like “suppliers and distributors, markets and clients, government regulatory agencies ...financial institutions and competitors” (Jaffee, 2001, p. 21). An organization’s external relationships are important, but not the focus of this study.

Research Design

In order to describe social structure, the following research questions were developed to guide the study:

1. *What formal organizational subunits and significant groups comprise the Penn State World Campus?*
2. *How do the subunits and significant groups coordinate their activities to produce organizational outcomes?*
3. *How does the social structure of the Penn State World Campus affect its overall operation?*

The research design for this study employs case study methods (Yin, 1995) and incorporates an embedded case design. In response to the research questions, the study endeavors to uncover the organization’s sequence, methods and activities for developing online programs, rewards,

incentives and consequences, the decision-making protocol, and similar data explaining the organization's internal make up and processes.

CHAPTER II

Distance Education - Definition, Scale and Scope

Introduction

The introductory chapter discussed concepts and considerations pertaining to distance education but neglected to assign a precise definition for it. Generally, distance education represents a formal education in which a physical and/or geographical separation exists between the instructor and student (Bates, 2005; Moore & Kearsley, 2005; Moore & Anderson, 2003). Derived from the European terms *Fernunterricht*, *Tele-enseignement*, and *Educacion a Distancia* (Keegan, 1986; Holmberg, 1986), distance education has become synonymous with a number of terms including distance learning, online education, open learning and e-learning.

While similar, these terms have distinct, but not uniformly accepted definitions. Too often, no distinction is made between distance education (DE), a formal process, and distance learning (DL), an expected outcome for students. Distance education incorporates aspects of web-based education, blended education and correspondence initiatives, which yields divergent learning approaches, technology, and organization characteristics causing exact meanings or interpretations for DE to become stymied.

Anglin and Garrison (2002) attribute inconsistencies in DE terminology to transformations in its development. "During distance education's origin when correspondence study was popular, Moore (1973), Holmberg (1977) and Garrison and Shale (1987) describe the separation of both time and distance as criteria for distance education" (Anglin & Garrison, 2002, p.160). Now that digital media, virtual classrooms and streaming video and have created the ability for immediate communication, definitions for distance education have been altered to encompass synchronous as well as asynchronous interaction (Porter, 2004; Moore & Anderson,

2003). Nonetheless, for this study and its associated application to DE organizations, distance education is represented by the following definition, modified from Moore and Kearsley, 2005.

Distance Education: The organization and management of institution-based planned learning that normally occurs in a different place from teaching, requiring special course design and instruction techniques, communication through various technologies, and special organizational and administrative arrangements.

Proliferation of Distance Education

In the United States, the field of education and training is among the top five exports in the services sector (U.S. Department of Commerce, 2002), due partly to contributions from distance education. In fact, DE is often considered a growth sector similar in scope to the health care industry; and, perhaps not since the introduction of the G.I. Bill has higher education expected and received such a large influx of students (Carr-Chellman, 2005).

Beginning about 1995 and continuing through the next three years, the U.S. Department of Education's National Center for Educational Statistics (NCES) reported a 72% increase in the number of distance education programs (NCES, 2000). In addition to DE program increases, student enrollments also swelled, surging from 754,000 students in 1994-1995, to 1.3 million in 1997-1998, doubling to 2.9 million in 2000-2001 (U.S. Department of Education, 2003). More recent projections estimate more than four million students participate in distance education (Primary Research Group, 2003) with just under two million in U.S. higher education (Allen & Seaman, 2004).

The growth, development, and demand for distance education also affect higher education institutions. Colleges and universities must now consider the risks and rewards of developing new courses, creating or expanding additional programs, and securing faculty who must respond to an expected thirty-three percent growth rate in higher education (Primary Research Group, 2003). Fortunately, DE growth patterns show little signs of waning. In 1998,

distance education accounted for just five percent of higher education but within four years, its statistics tripled, representing more than fifteen percent of all higher education in 2002 (American Council on Education, 2003). More recently, Allen and Seaman (2004) report the average growth rate for online students in 2004 was 24.8%, up from 19.8% in 2003.

Cavanaugh (2004) credits the explosive and continued expansion in distance education to a convergence of factors. First, she explains that technology has dramatically improved, producing more affordable, available, familiar and interactive mediums. Secondly, and perhaps more importantly, the outcomes of technology improvements have affected the learning process, allowing it to become more interactive, engaging, less expensive, and more conducive to individual learning styles (Cavanaugh, 2004; Porter, 2004).

Another growth factor for distance education derives from its convenience and flexibility. DE as a conduit of convenience has the ability to reduce congestion on campuses by eliminating the need for commuting students to drive and park. Furthermore, DE and its virtual environment allow students the flexibility to adjust to their part-time employment schedules and study at their convenience, all of which becomes a welcomed option in comparison to traditional resident instruction.

Distance education also benefits from factors like multiple careers moves and the need for lifelong education. In the current job market, employees no longer remain in the same career for decades at a time. The demands of part-time work, telecommuting and leaving and re-entering the full-time work force, (Martz, Reddy & Sangermano, 2004) create the need for immediate skill development and credentialing. Again, distance education responds well to these factors, allowing employees and students to begin, stop and acquire skills at their convenience and pace.

Various Organizational Models of Distance Education

Just as distance education offers the learner flexibility through multiple choices of technology, pace of instruction and delivery medium, the organizational design, governance and models associated with DE are similarly varied and flexible. Throughout the United States, institutions of higher learning select among divergent organizational approaches to deliver distance education. Most institutions are advised to select their organizational model cautiously considering DE has the ability to create serious challenges to their respective academic, technology and financial plans (American Council on Education, 2003). These challenges generally concern the fit, misfit or conflict of implementing distance education. Commonly, university stakeholders question, does DE align with the mission of the university? Does a for-profit model serve our institution's needs better than a not-for-profit model? Is it more appropriate to develop a completely separate DE entity, or perhaps a model that incorporates components of each is best?

Hanna (2003) identifies distance education models ranging from on-campus models to wholly virtual models. The following section provides a brief overview and general description of four DE models including their primary organizational characteristics. The four distance education models described are: The Virtual University, The Corporate University, The For-Profit University, and The Dual-Mode University.

Virtual University

Virtual universities are educational entities absent of physical campuses or resident instruction. They exist in cyberspace, online or through telecommunication networks. Organizationally, most virtual universities operate under two distinctly different models, one centralized and the other distributed. The centralized model provides "both administrative and

academic services to students” while the distributed model, “hosts an online catalog but institutions provide most of the services” (Epper & Garn, 2004, p. 29). For example, Penn State’s World Campus, a centralized model, offers academic courses, student services with administrative oversight. The distributed model differs primarily by only hosting courses and programs. Each respective course or program may be offered by several different institutions.

Corporate University

From an organizational perspective, the corporate model offers little resemblance to colleges or college life. Instead, larger companies like “American Express, Cisco Systems, Dow Chemical, Ford, and McDonald’s revamped their old training divisions, added technology and renamed them corporate universities” (Rumble & Latchem, 2004, p.129). A perceived advantage of corporate universities lies in their ability to service their workforce. The corporate university can orientate and cultivate employees to fit into the culture of the company and provide specific, detailed skill sets to improve the company’s products and core technology. The corporate university derived from companies’ desire to achieve “tighter control and ownership over the learning process by more closely linking learning programs to real business goals and strategies” (Drucker, 1998, p. xi).

For-profit University

Just as the name implies, the for-profit model and its associated decisions are often guided by a financial bottom line. Organizationally, these universities are considered “more nimble, entrepreneurial, and adaptable than their comparatively staid non-profit parents” (Bleake, 2003, p 6.). The for-profit model may also include add-on units or spin-offs of the traditional university. Examples include New York University’s well-known NYUonline and investment-based companies like the Apollo Group’s University of Phoenix (Bleake, 2003). The

for-profit model typically operates multiple campuses or satellite centers in a number of cities throughout the nation and can deliver instruction through a combination of face-to-face and online instruction.

Dual-mode University

The dual-mode university remains among the most common distance education model. The dual-mode university distributes distance education in concert with its existing traditional university. The term dual-mode reflects the university's ability to provide instruction simultaneously on and off campus. This dual-mode ability allows instruction to occur through "asynchronous correspondence methodologies using print, multimedia and the Internet...and by extending the traditional classroom using face to face instruction via connective technologies (Rumble & Latchem, 2004, p. 123).

Often, the dual-mode university creates a separate distance education unit, division or organization that produces and delivers the university's courses and programs online. These DE units are frequently organized through Continuing Education departments or established as separate, affiliate entities responsible for the university's deployment of distance education. Their organizational make-up generally entails an "administrative staff, instructional designers, and technical specialists whose sole responsibilities are distance education" (Moore & Kearsley, 2005, p. 4.). Faculty members are generally hired from the parent university.¹

Challenges, Opportunities and Threats

The focus of the preceding section was to further the discussion on distance education, particularly in reference to DE growth factors and organization models. This section examines three themes more closely: *Obstacles*, the impediments hindering distance education's growth

¹ Penn State operates as a dual-mode university.

and development; *Benefits for Universities*, the rewards for organizing DE appropriately; and *Risks*, exposing the severe consequences that may potentially cause organizational failure. This section provides an overview and better understanding of challenges, opportunities and threats to the success of DE endeavors in an effort to respond to them more appropriately.

Challenges

As long as technology continues to afford newer and more efficient opportunities for teaching and learning, anticipating all the challenges for distance education is probably unlikely (Hantula & Pawlowicz, 2004). While the benefits and application of technology have significantly enhanced many areas of DE, such as student interaction and administrative processes, certain challenges and consequences will exist for distance education regardless of technological innovation. Currently, some of the more notable DE challenges entail institutional issues, costs, and student and faculty issues².

Institutional Issues

Institutional issues include strategic planning, effective governance and administrative or university support. Strategic planning is the extent to which institutions develop ideas on how to achieve specific long-range goals. Certainly, universities develop strategic plans, but too frequently, universities join the DE bandwagon before thoroughly assessing their institutional capabilities, limitations and subsequent risks. To omit putting forth this assessment effort is possibly the first step toward failure.

For many organizations new to DE, “it is recommended to propose a plan that is built on a gradual development process, rather than implementing a full-fledged program without proper

² The focus of this study is in part related to organizational concerns, therefore student and faculty issues are acknowledged but not discussed a major theme. Institutional issues and costs and their related challenges will be addressed.

acceptance by the faculty, students and administrators” (Levy & Ramin, 2004, p. 284). This plan of action, the think-big, start-small and build-fast methodology, “allows institutions to progress with their [DE] project one step at a time, building and improving based on feedback” from stakeholders (Levy & Ramin, 2004, p. 284). Considerations within strategic plans typically address funding sources, securing academic markets, soliciting potential students, faculty development, infrastructure needs, developing effective policies and procedures and maintaining quality measures.

Securing institutional support continues to be a difficult task. More prevalent for dual-mode institutions; institutional support is exemplified by the commitment level an institution provides the DE organization. Examples of institutional support for DE organizations include: the allocation of an ample budget, favorable policy statements, feelings of organizational security and backing from university leadership.³

Commonly, dual-mode universities lacking sufficient institutional support are often presented with obstacles difficult to overcome. For example, when diminished state appropriations or severe budget cuts are unavoidable, peripheral departments such as continuing education and DE units are generally sacrificed more readily than other university entities. Conversely, those fully-integrated and well-supported DE organizations that are included in the university’s annual budget, receives favorable policies and ensure students have access to online registration, financial aid and library resources are likely to experience more success (Bates, 2005; Carnevale, 2005; Moore & Kearsley, 2005).

Costs

³ Ideally, faculty involvement would be categorized and considered as institutional support, however securing faculty remains a challenge for most dual-mode institutions.

Calculating costs remains one of the more difficult and *guessed at* aspects of distance education. Rumble (2003) asserts the challenges associated with costs are identifying the huge “variation in costs of products and services to students,” and trying to identify the “cost drivers actually pushing costs” (p.712). A frequent complaint issued by DE administrators suggests cost calculations and ROI formulas are far too difficult to apply. In distance education organizations, calculating costs has become an acquired skill due to changing variables like fluctuating enrollments, use of multiple facilities, unstable overhead costs and determining the costs for course development, which is dependent upon the level of technology. Ultimately, and perhaps unfortunately, cost decisions and fiscal allocations can be the difference between successful DE organizations or the waste of millions of dollars. Table 2.1 identifies additional distance education challenges.

For Students	Overcoming or adjusting to an autonomous learning environment or the independent structure of courses and technology (Dabbagh & Bannan-Ritland, 2005).
For Faculty	Adjusting to the lack of nonverbal communication cues from students, increased workloads, and the shift to 24-hour availability (Palloff, 1999).
Infrastructure	Deciding what to outsource to commercial vendors (Bates, 2005).
Policies and Procedures	Establishing effective polices that address teaching requirements, course development, intellectual property, and assessment of quality (Duffy, 2004).

Table 2.1 Distance Education Challenges

Opportunities

Although distance education continues to face a number of challenges, institutions have not retreated from the DE movement. In fact, many colleges and universities look to position

themselves in the DE field for elaborate, well-conceived and rational reasons. Normally, institutions explore opportunities in distance education for similar reasons, including:

1. Expanding the institution's visibility.
2. Expanding access to students.
3. Rebelling against or becoming increasingly frustrated with traditional ways of teaching, learning and out-dated business practices.
4. Improving institutional statue, reputation and prestige
5. Generating and/or saving revenue (Livingston & Wirt, 2004; Moore & Anderson, 2003).

While the above list identifies only five opportunities, they remain more than adequate for colleges and universities to enter the DE playing field.

Kyrish (2004) supports and expounds similar ideas, "If planned correctly, an online program can expand an institution's reach, enhance its statue, and satisfy needs for its traditional and non-traditional students" (Kyrish, 2004, p. 2). Institutions pursuing opportunities in distance education can benefit from DE's ability to help manage expenses, improve the quality of learning, focus on customer needs, and respond to competitive pressures (Howard, 2004; Kyrish, 2004). Ample opportunities and benefits exist in distance education, but institutions must recognize their strengths, set obtainable goals, and more importantly, accept their limitations.

Threats

Threats to distance education are more severe than the challenges discussed earlier. The unforgiving consequences of threats are often equated to or result in organizational failure. In 2002, the National Education Association Research Center reported, distance education efforts found many ways to fail (Wilner & Lee, 2002). The continuous reporting of DE failures and closings may appear surprising, especially when considering the surplus of untapped opportunities and the millions of students participating in distance education. Nevertheless, 'failure', 'closing', and 'restructuring' remains replete in DE headlines. The recent departures of

distance education organizations at various universities exemplify these threats and a review of headlines from *The Chronicle of Higher Education* reveals an alarming concern.

- *California Virtual University Will End Most of Its Operations* (Blumenstyk, 1999)
- *Thomson Will Shut Down Harcourt's Online College* (Blumenstyk, 2001)
- *Temple U. Shuts Down For-Profit Distance-Education Company* (Blumenstyk, 2001)
- *United States Open U. to Close After Spending \$20 Million* (Arnone, 2002)
- *After Losing Millions: Columbia U. Will Close Online-Learning Venture* (Carlson, 2003)
- *Britain Dismantles a Virtual University After It Failed to Attract Enough Students* (Carnevale, 2004)
- *Cornell U. Revamps its Distance-Education Unit* (Carnevale, 2004)

The cause for these closings and threats to distance education organizations are usually attributed to factors such as low-quality programs, poor academic reputation, ineffective governance and unstable financial health (Waterhouse, 2005; Moore & Anderson, 2003; Carr-Chellman, 2005).

Response to DE Challenges and Threats

The field of distance education often responds to the above challenges, threats and subsequent failing DE organizations with barriers to success studies and best practice guidelines. As mentioned in chapter one, barrier studies expose obstacles and complexities that may potentially affect the success of distance education organizations while best practices are designed to promote quality and identify successful procedures.

Barriers Studies and Best Practices

Hoping to illuminate common and often avoidable mistakes for distance education organizations, several authors and educational consortia discuss barriers and best practices (Abel,

2005; Amey & VanDerLinden, 2003). In the previous chapter, I argued that barrier studies and best practices have limited application. Accordingly, this section synthesizes a transition in the ‘types’ of barriers and identifies an expanding coverage area in best practices.

Dating back several years, barriers have been discussed in reference to poor-quality programs and high-quality programs (Moore, 1998). Barriers impeding high-quality DE programs were categorized with a lack of institutional support and an “unwillingness to specialize”, suggesting that institutions were attempting to be all things to all people (Meyer, 2002, p. 76). As technology and faculty/student interaction improved, barriers studies began to emphasize a lack of course transferability, rigid organizational structures, unreliable systems, outdated administration and cultural obstacles (Berge, 1998; Edmonds, 1999; Mulienburge & Berge, 2001). While many barrier studies overlap in theme, it can be inferred that few institutions fully understood the capabilities of distance education; many simply attempted to replicate traditional education practices.

Recently, more complicated and intricate matters have emerged for DE organizations. Barriers once affecting pedagogy and institutional support have become eclipsed by congressional regulations and policies dictated by state legislators or professional associations (Levine & Sun, 2002). As a result, distance education organizations must now address financial aid restrictions, stringent intellectual property negotiations and disability requirements.

For example, serving as an advocate for students, Congress enacted a fifty percent rule and the U.S. Department of Education created the 12-hour rule. These rules were created to combat diploma mills and to diminish educational fraud. Essentially, negligent institutions were denied federal aid if they delivered more than fifty percent of their courses via

telecommunication⁴ and students who participated in face-to-face instruction less than twelve hours a week were denied aid as well (Moore & Kearsley, 2005).

Best Practices

Responding to the rapid and extraordinary growth in distance education several organizations developed principles, guidelines and benchmarks to promote quality and effectiveness in DE. A review of best practices and strategies include topics on course development, faculty training, student services, pedagogy, learning resources, infrastructure and evaluation. While best practices are useful, the advancements in technology may prove too difficult for best practice guidelines to remain current with DE practice.

Nevertheless, fundamental principles were designed by accrediting agencies and large-scale foundations such as the Sloan Foundation, the American Council on Higher Education, the Global Alliance for Transnational Education, the Southern Regional Electronic Campus, and the Western Cooperative for Educational Telecommunications. This study does not attempt to rate these organizations or distinguish good practice from bad practice; the point here is to identify a continuing deficiency.

For example, the following statement reflects the intent and purpose of one of the premiere best practice documents. It reads, “Best Practices express in detail the best practices in distance education and provides a common understanding of the elements that are reflective of quality distance education programming” (WCET, 1995, p. 1). The document attempts to

substantiate that claim with the following example for best practices in regard to Institutional Context and Commitment:

The institution's budget and policy statements reflect its commitment to the students for whom electronic programs are designed. (WCET, 1995)

Another popular and more recent example reflects statements from the *Institute for Higher Education Policy* (2000). "These benchmarks distill the best strategies used by colleges and universities that are actively engaged in online learning, ensuring quality for the students and faculty who use it" (Institute for Higher Education Policy, 2000, p. vii.). Below is an excerpt from their guidelines.

Institutional Support Benchmarks

- The reliability of the technology delivery system is as failsafe as possible (Institute for Higher Education Policy, 2000).

How well do these guidelines and recommendations '*express in detail*' or '*ensure quality*' for distance education organizations?

Summary of Best Practices and Barriers

Undoubtedly, best practices, barriers studies and similar resources remain highly circulated, practical and useful. However, while these resources provide helpful considerations and effective strategies to improve singular or isolated areas like assessment, teaching and technology; best practices and barrier studies are severely limited when relied upon to resolve more collectively integrated, or macro-level organizational dilemmas and threats. Essentially, these documents are effective for piecemeal diagnosis, but offer minimal assurances for defending against DE organizations approaching closure, failure and restructuring.

Alternatives to Best Practice and Barrier Studies

Recognizing that best practice and barrier studies were extremely limited in their ability to inform decision makers, and too broad to prevent DE institutions from avoiding closure, attempts were made to address the issue. The distance education literature began to expand, focusing more on organizational models (Porter, 2004; Cavanaugh, 2004; Monolescu, 2004). The DE literature suggested DE programs needed to focus on the total educational system rather than focusing exclusively on computers and technology (Bates, 2005; Moore & Kearsley, 2005; Robins, 2002; Johnson, 2003).

As early as 1994 Moore (1994) expressed these same concerns, suggesting the major problems in distance education were associated with organizational change and administrative structures. More than ten years later these same threats still exist. Davis (2004) agrees, calling for a more deliberate focus on the DE infrastructure. Threats such as an ineffective infrastructure reside within the DE organization and these internal threats are affected by the structural design, coordination, and integration of work activities.

Jaffee (2001) describes this integration as the balance between managing employees in organizational settings and the appropriate decision to differentiate work activities by specific duties, occupations, departments, and units. Challenge occurs in organizations when attempts are made to manage the tension between these two transactions, the human factor and division of activities (Davis, 2004). The inability to manage this tension may pose severe threats to DE organizations.

With an increasing emphasis on organizational models, infrastructure, and a total systems approach to DE, Prestera and Moller (2002) examined the organizational alignment of distance education programs and found a need for DE organizations to pay closer attention to coordination activities. The authors examined human performance technology to provide a

model for supporting DE and established improvement strategies such as “benchmarking and documenting workflows, setting clear expectations, and developing feedback systems” (Presterer & Moller, 2002, p1). Their work outlined an organizational structure in which design, policy, and implementation issues can be addressed by “measuring actual performance; comparing results against pre-set goals; and implementing system, processes, and practices that are vertically aligned with those goals” (Presterer & Moller, 2002, p.3.).

A Gap Exposed

Including the expanding literature base, DE decision-makers are not exclusively restricted to best practices and barrier studies to resolve all DE threats. A scan across the distance education landscape reveals more than adequate knowledge and insight exists to address well-established, beginning or even vulnerable DE organizations. Neophytes and veterans in the field are aware of the preparation necessary to create and deliver distance education (Bates, 2005; Allen & Seaman, 2004; Johnson, 2003; Berge, 2001). Tools, resources and pertinent literature focusing on distance education setup, delivery, and sustainability are abundant (Dabbagh & Bannan-Ritland, 2005; Cavanaugh, 2004). Saturated perhaps best describes the number of sites, organizations, conferences and relevant outlets dedicated specifically to the betterment of the field. However, despite the wealth of these resources, many of us are still investigating why some DE organization flourish while others fail (Howard, 2004; Guri-Rozenblit, 2003).

The missing link and possibly some rewards might be found if the question is approached from another perspective. DE authorities suggest the field warrants extensive research on topics other than pedagogy, technology, and faculty and student perceptions (Moore & Kearsley, 2005; Bates, 2005; Berge, 2001). These areas dominate the DE literature base, but it has been

demonstrated that poor teaching can be overcome and faculty perceptions and technology, whether too much or too little, rarely become the deciding factors in failed DE organizations (Waterhouse, 2005; Garrison, 2000). In short, pedagogy, technology, and perceptions by themselves do not result in the closure of DE organizations. But as cited in the previous chapter, DE organizations do close, modify their goals and restructure in their quest for survival.

Bridging from DE literature on effectiveness (Howard, 2004), and the need for a total systems approach (Moore & Kearsley, 2005); it is conceivable the gap between DE organizations that survive and those that fail may be diminished with a better understanding of organizations and organizational theory. Few references to organizational theory exist in the current distance education literature. Fusing together perspectives from organization theory with DE practice fills a void, a pressing gap representing concepts of organizational performance, behavior, structure and coordination. These concepts in concert with other aspects of organizational theory provide DE with a grounded discipline; one that might elicit an improved outlook of the inner workings of DE organizations and ideally, assist the field identify the characteristics associated with successful DE organizations.

Organizational Theory

What exactly is organizational theory and how is it applicable to distance education? Hatch (1997) explains that organizational theory is used to “help analyze complicated situations and discover effective means of dealing with them” (p3). Pfeffer (1996) suggests, “one important goal of organizational studies is to understand why some organizations fare better than others” (p70). Scott (2003) stresses the interdependence of external connections and internal structure, while Shafritz and Ott (2001) believe organizational theory is “cultivated to explain and predict how organizations and the people in them will behave in varying organizational structures,

cultures, and circumstances” (p3). The general premise of organizational theory provides a basis for understanding how organizations work, and what makes them work.

Value and Need of Organizational Theory

A value of organizational theory rests within its ability to separate the numerous and simultaneous activities occurring within organizations and expose those internal forces that affect organizations. Pfeffer (1997) comments on the value and use for studying organizations and suggests once the characteristics of successful organizations are understood, it will likely lead to attempts to mimic the more effective organization. However, determining what organizational success looks like in the DE environment remains elusive.

As DE organizations continue to face new challenges and undergo transformations, the DE literature appears to lag behind, particularly as it relates to the organization’s internal processes and methods of conducting business. For example, in the online environment, the accelerated pace of business, the need to do more with less, our general lack of patience and the demand to have information not now, *but right now* presents challenges for the delicate, yet intricate nature of organizations.

These intricate circumstances produce changes in work dynamics, allowing for instance more freedom for employees to work from home or autonomously. Unfortunately, many times these changes also adversely affect the organization’s communication processes, its reporting structures, and the ability to effectively manage employees and their work activities.

Organizational theory helps us to better understand these organizational issues and may potentially equip DE organizations with more effective means to respond to their threats and operate more successfully.

Organizations

Before delving further into concepts of organizational theory, I offer a definition for organizations. Organizations are assemblies of people distinguishable from groups, teams or associations by some of the following characteristics. First, a primary objective for organizations is to survive. For example, if the Women’s Foundation for Breast Cancer suddenly found a cure for breast cancer, it is unlikely they would disband the organization; instead they would likely modify their goals and purposes and continue to operate in another capacity.

Typically, organizations overlap within five core concepts: environment, technology, participants, social structure, and goals.

- The environment is “conceptualized as an entity that lies outside the boundaries of the organization. It influences organizational outcomes by imposing constraints and demanding adaptation as the price for survival” (Hatch, 1997. p. 63).
- Technology represents the various tools used to produce organizational outputs (Bowditch, 1997).
- Participants are generally characterized as employees or individuals, who in return for some inducement make contribution to the organization (Scott, 2003).
- Social Structure addresses relationships among people and units and focuses on divisions of labor and coordinating the work activities (Pfeffer, 1997).
- Goals are desired ends that participants attempt to achieve through their task activities (Scott, 2003).

Rational and Natural Systems

Incorporated within organizational theory are various approaches, perspectives or systems used to analyze organizations. Among the more frequently referenced analytical frameworks are open, rational and natural systems. Scott (2003) explains that these systems, in fact, all systems are characterized by a combination of parts (people, technology, goals) whose relations make them interdependent. Deciding between open, natural and rational systems is

partly distinguished by the manner in which the parts are composed. “Some parts within a systems vary from simple to complex, from stable to variable, and from nonreactive to reactive” (Scott, 2003, p. 83).

For example, organizations designed to attain specified goals through somewhat rigid, strict and formalized structures are generally perceived to fall within a rational systems perspective. The rational system perspective is often equated with terms such as efficiency, optimization, control and authority (Scott, 2003). A defining characteristic of the rational systems is the significance or insignificance of participant behavior. Participant behaviors in these organizations are viewed as more predictable and standardized due to clearly defined rules and established role expectations. As an analogy, the behaviors of some participants have been described as turning off your mind and your intellectual judgment and “blindly conforming to the performance program specified by the job description” (Scott, 2003, p. 55).

Contrasting the rational systems perspective, natural systems theorists view organizations as “more than instruments for attaining defined goals; they are, fundamentally, social groups attempting to adapt and survive in their particular circumstances” (Scott, 2003, p. 57). Essentially, natural systems emphasize organizational survival. Natural systems theorists accept the notion that organizations may have goals, but they believe the prolonged life of the organization supersedes all goals.

In respect to participant behavior, natural systems theorists “emphasize that there is more to organizational structure than the prescribed rules, the job description, and the associated regularities in the behavior of participants” (Scott, 2003, p. 59). The natural systems perspective introduces the concept of an informal structure. In a concise statement describing the two systems, Scott (2003) writes, “rational systems are designed, but natural systems evolve; the

former develop by conscious design, the latter by natural growth; rational systems are characterized by calculation, natural systems by spontaneity” (p 81).

Open Systems

A significant difference between open systems and rational and natural systems rests with the role of the environment. The following passage expounds on the concept of open systems.

Planners are not omniscient so that they know all the possible contingencies that are going to confront various position occupants in the structure. The environment within which the organization operates and the environment for any particular position is sufficiently unstable and unpredictable that it is dangerous to program in advance the behaviors of participants. In a highly formalized structure, participants are not expected to exercise personal discretion but only to conform to their performance program – to carry out their assigned duties in the specified manner. Such programming ... can result in a high order of inefficiency and ineffectiveness- the trained incapacity for which some organizations are notorious (Scott, 1970, p. 315).

The environment, according to open systems supporters influences and penetrates the organization. Generally, open systems theorists suggest open systems parts are more loosely coupled and decision-making and participant behavior is less prescribed and controlled than the other two systems. Defined, open systems are capable of “self-maintenance based on a throughput of resources from its environment” (Scott, 1996, p. 78). Open systems are further defined by their ability to “restore their energy, repair breakdowns in their organization, and... improve their structures and routines” (Scott, 2003, p. 90).

The open systems perspective was selected for this study not only because it is applicable for understanding multiple layers within the organization, but also, it can focus on multiple parts of the organization, like the people, their actions and the problems associated with coordinating their activities. By incorporating an open systems perspective, it is possible to analyze any organization, subunit, or component of the organization. More importantly, this systems

approach can help researchers examine the interactions between units, levels, and subunits within the organization (Harrison & Shirom, 2003).

Specifically, the open system framework aligned well with this study because it remains the most congruent fit for analyzing the social structure of organizations. Lastly, there remains another distinct feature for selecting an open systems perspective. Unlike other perspectives such as the rational or natural system perspective, an emphasis of the open system is on information flow, sense-making activities and organizing as oppose to organization (Scott, 1996; Scott, 2003).

Social Structures

Organizations can be viewed as individuals interconnected as members of social networks interpreting, sharing, creating and acting on information and knowledge or lack there of (Zack, 2000). “Without the participation of these individuals, there is no social structure, no organization” (Scott, 2003, p. 21). Social structures refer to the relationships among these individuals, their positions and the organizational units to which they belong. These patterned and repeatable aspects of the relationships, beliefs and activities existing among participants have become increasingly vital as researchers acknowledge their impact on organizations. Through social structures, it is possible to analyze organizations and account for the social influence within the organization.

For example, a well-designed organization cannot control and predict all the activities and interactions of its personnel. In spite of the details, time and effort dedicated by management to designing a rational organization chart and intricate procedure manuals, the design plan can never completely determine the conduct and social relations of the organization’s members (Blau

& Scott, 2003). As a general illustration for the need to understand social structure, Hatch (1997) provides this example:

Organizations form around tasks that are too large for individuals to perform by themselves. The advantage of organizations over individuals comes from pooling different skills and abilities. If some person take responsibility for one part of a task, while others perform other parts, much can be achieved that would be impossible otherwise (Hatch, 1997, p.162).

Implied but missing from this example are behavior characteristics, rules, norms and values that are associated with the organization's members. Additionally, the pooling of different skills requires the coordination of many people, their respective job tasks, and attention must be given to the nature of employee relationships, including their motives and personal agendas. Social structures in many ways represent the manner in which these behaviors and the elements of an organization (participants, goals, technology and environment) are collectively utilized and coordinated.

To coordinate these activities introduces another critical force simultaneously co-existing within the formal organizational structure, an informal structure. Scholars such as Mayo (1945) and Dalton (1959) challenged the concept that organizations were simply technical instruments and that participants were exclusively utility-maximizing actors. Instead, the authors emphasized motivational frameworks, the importance of informal structure such as "interpersonal ties of friendship and normatively defined expectations" (Blau & Scott, 2003, p. xii).

An informal structure aligns with the behaviors and motives operating outside the given responsibilities of the formal job responsibilities and is associated with individual characteristics and desires. An organization's informal structure can significantly support, oppose and influence organizational outcomes by improving or weakening communication, facilitating or impeding trust and correcting or causing the inadequacies of the formal system (Scott, 2003). Collectively,

the formal and informal structures of organizations are important factors to consider when looking to achieve or improve organizational success. A social structure is the mechanism that can appropriately address the informal and formal structures.

Normative, Behavior and Cultural-Cognitive Structures

Within the open systems framework, this study explores three salient components that help define an organization's social structure: normative, behavior and cultural-cognitive structures. Normative structures "constitute a relatively coherent and consistent set of beliefs and prescriptions governing the behavior of participants" (Scott, 2003, p 19). These beliefs generally include values, norms and expectations. Simply stated, the normative structure identifies professed goals, what 'should be' or offers a prescribed interpretation of intentions. For example, the director of human resources may claim she is committed to equal employment and a diverse workforce, but if certain groups are targeted for employment and others omitted, or if most members of the organization are of the same race, gender and background, her commitment may seem disingenuous. Stipulating or prescribing something (normative) can be quite different from reality and is the basis of the behavior structure.

The behavioral structure deals in actual behavior as oppose to prescribed beliefs. The behavior structure represents the recurrent behavior or consistent patterns of individuals and is concerned about what is done rather than what is planned. Using the example above, if the director of human resources speaks about the benefits of diversity training, but discretely, yet consistently speaks with racial slurs; an obvious dichotomy exists between the two structures. What is written or stated to be reality, in fact does not adequately reflect reality, thus leading to the cultural-cognitive structure.

The cultural-cognitive structure pertains to the “beliefs and understandings the participants share about the nature of their situation and interests” (Scott, 2003, p 19). This structure is used in some regard to help individuals explain, interpret or understand their actions. Continuing with the example, the director stated she was committed to equal employment and diversity in the workplace (Normative Structure). Upon further examination, it is discovered that her actions, hiring a largely identical workforce and using inappropriate or offensive language does not match her statements (Behavior Structure). The director may or may not attempt to justify her actions depending on her individual beliefs (Cultural-cognitive Structure). Investigating and incorporating these three elements significantly strengthens the ability to adequately examine and describe the social structure of the DE organization.

CHAPTER III

RESEARCH DESIGN

Purpose Statement

This exploratory case study describes the social structure of the Penn State World Campus, a distance education organization considered successful and held in high regard. Again, the term social structure represents the internal makeup of an organization. It includes formally defined units and people within the organization as well as their patterned and repeatable activities. Within the organization's social structure, I explored incentives, processes, the decision-making protocol, the interaction and communication practices between participants, subunits and similar data illustrating the manner in which the organization operates.

This chapter outlines the study's research protocol and design elements by explaining the procedures and methods used to complete the investigation. Understanding the sequence of workflow activities, reporting structures, departmental interactions and other factors contributing to the sustainability of the World Campus requires a plan. This chapter represents my plan; it details my journey through research questions, data collection and analysis.

Research Questions

The following research questions were developed to help guide the study:

1. *What formal organizational subunits and significant groups comprise the Penn State World Campus?*
2. *How do the subunits and significant groups behave to produce organizational outcomes?*
3. *How does the social structure of the Penn State World Campus affect its overall operation?*

Research Method

The case study method was selected because it aligns well with the purposes of this inquiry, particularly when considering the following case study qualities described by Olsen (1982):

- *Particularistic Nature* – it can suggest to the reader what to do or what not to do in a similar situation
- *Descriptive Nature* – illustrates the complexities of a situation – the fact that not one but multiple factors contributed to a situation or phenomenon
- *Heuristic Quality* – “it can explain the reasons for a problem, the background of a situation, what happened and why” (Olsen, 1982, pp. 138-139).

Case study methods are also beneficial and appropriate for 1) “gain[ing] an in-depth understanding of the situation and meaning for those involved” (Merriam, 1998, p. 19); 2) “expected to catch the complexity of a single case;” and; selected because 3) “they look for detail of interaction with its contexts” (Stake, 1995, p. xi). Because this study examines intricate organizational processes, requires interpretation of participant responses and seeks a comprehensive understanding of how the DE organization operates, a case study was appropriate because its interest is in the “process rather than outcomes, in context rather than a specific variable, and in discovery rather than confirmation” (Merriam, 1998, p. 19).

This exploratory case study also incorporates an embedded case design. Embedded case designs are generally selected when, “within a single case, attention is also given to a subunit or subunits” (Yin, 1984, p. 44). In this study, these subunits refer to the explicitly defined formal sections of the DE organization. These organizational subunits have specific tasks to perform as well as specific personnel.

Sampling

Units of Analysis

This study includes three units of analysis: The World Campus (the case), formal subunits within the World Campus and individual informants.

The Case

The World Campus represents the case for this study.⁵ The World Campus operates as the distance education delivery unit for The Pennsylvania State University. Officially launched in January 1998, the World Campus currently enrolls more than 6,200 learners in more than twenty-four programs from all fifty states, forty-three nations and every continent (Burns, 2004). Academically, the World Campus prides itself on the quality of its courses and programs. Faculty members who teach through the World Campus are in most instances, the same faculty who teach resident students (World Campus Catalog, 2004) and the number of academic offerings has expanded to include approximately 150 courses.

Operationally, the virtual campus has recently transitioned. The transition results from the merging of two departments within Penn State Outreach, 'Distance Education' and 'Continuing Education'. The merge of these two departments into 'Continuing and Distance Education' expects to eliminate process overlaps and reduce duplicated services. As a result of this consolidation, the World Campus has also restructured. Three former World Campus subunits have departed and transitioned to serve larger support roles for Penn State Outreach.

While the World Campus has no academic authority, it partners with academic units to deliver courses, degree and certificate programs. As an incentive for the partnering academic unit or college, the World Campus incorporates a revenue-sharing model, aiming to recuperate its

⁵ This section provides a brief overview of the World Campus. The intent is to illustrate the design of the study. A more detailed description of the World Campus and its operation is provided in Chapter 4.

production and delivery costs while generating revenue for participating academic units.

Ultimately, Penn State's leadership anticipates the World Campus will be "at the center of a fully institutionalized web of education and learner support innovations that will serve students better and foster change across an entire academic environment" (Ryan, 2000 p.30).

Criteria for Selecting the Case Study

Determining which case to select generally begins by establishing certain criteria (Eisenhardt, 2002). With respect to the research questions and purposes, cases may be selected based on criteria that will "likely lead to understandings, assertions, perhaps even to modifying of generalizations" (Stake, 1995, p. 4). Selecting the case for this study began with a relatively simple goal: to identify a successful distance education organization. The next step was to define 'successful' and then find those qualities and characteristics within a distance education organization.

Based on readings from Pacey (2003), Sherry, (2003) and Schrum and Benson (2002), as well as a fusion of recommendations listed by distance education evaluators and best practice guidelines (Simonson & Bauck, 2003; Tulloch & Sneed, 2000), the following criteria were selected to identify the case:

- The distance education organization has an identifiable social structure and has operated for at least five years.
- Leadership aspires to integrate the DE organization seamlessly within a university environment.
- The DE organization consistently demonstrates high learner satisfaction scores.
- The DE organization provides evidence of policies and practices that value distance education and promotes sustainability.

The Penn State World Campus was selected as the case not only because it fulfills these criteria, but also because it continues to receive national recognition as an exemplary distance education organization. At the Eighth Sloan Consortium (Sloan-C) International Conference on

Asynchronous Learning Networks, Penn State received two awards: Excellence in Online Faculty Satisfaction and Excellence in Online Cost Effectiveness. Other awards and accolades include the 2002 and 2004 Bill Murphy Barrier Buster Award from the American Distance Education Consortium (ADEC) for its success in “eliminating the barriers of time and place; for working effectively to bring online distance learning into the mainstream of Penn State's academic community;” and it was cited for its leadership in “raising awareness and understanding within the national higher education community of effective approaches for online delivery in distance education” (Outreach, 2003, p9).

Additionally, the ADEC’s Executive Director considers the World Campus a “national model of integration and institutionalization within the university setting, it serves as a prototype for the still developing field of online distance education nationally” (Outreach, 2003, p14). In conjunction with these awards, students also describe the World Campus as exemplary. According to student surveys, approximately ninety percent of the students surveyed said they were satisfied or very satisfied with the amount of knowledge gained in their World Campus course; eighty-seven percent said they were satisfied or very satisfied with the analytical and problem-solving skills they developed; and eighty-eight percent said they were more effective at work as a result of a World Campus course (Outreach, 2003).

Embedded Subunits and Informants

Embedded subunits exemplify the formal structure of the organizations. The formal structure provides a glimpse as to how tasks are divided to coincide with the DE organization’s daily operation. The first research question responds to the formal structure; I introduce, describe and explain the responsibilities of each subunit and explain how informants were identified and selected. I investigated every subunit within the World Campus plus one additional unit because

it remains instrumental in the organization's program development process and daily operation. The subunits include Program Planning and Management, Instructional Design and Development, Student Services, Data Management, Business and Finance and an external Marketing unit.

Identifying informants for this study and within these subunits was conducted with purposive and snowball sampling (Glicken, 2003). Purposive sampling is the intentional identification of informants who are believed to be best suited to respond to the phenomenon's purpose. Snowballing refers to techniques where informants suggest other potential informants; it is the snowball effect where one informant leads to another, and to another and so forth. The procedures used to secure informants are further explained in the Access section. The following criteria were used to identify and select informants:

- The World Campus has operated for six years and potential informants should have a minimum of three years working experience. This criterion allows employee cultivation and understanding of the organization's intricate processes, relationships, ways of doing things, historic progression and life-cycle.
- Informants were selected from multiple affiliations with the organization: World Campus, Penn State University, external foundations, and other associated agencies.
- Informants were selected primarily with an expectation that their association, years of service and organizational position would contribute to the understanding of the social structure of the World Campus.

Access

As a former employee within Penn State's Continuing Education department and employee for The American Center for the Study of Distance Education, I was fortunate to have professional relationships with key University administrators. Because of these relationships and their contacts, I was essentially granted unbounded access to the case, its personnel and its resources. Access, a critical component for all case studies (Yin, 2003; Stake, 1995; Merriam,

1998; Patton, 1990) as well as the ability to draw from multiple data sources within the organization became significant strengths of this study.

To gain access to the World Campus and relevant personnel, the Associate Vice President for Outreach at the Pennsylvania State University informally introduced the study to World Campus Senior officials. After their conversation, the Associate Vice President introduced me to the Senior Director of the World Campus. The Senior Director and I met to talk about the study in greater detail and upon receipt of Human Subjects approval, the Senior Director sent an email to World Campus personnel introducing me, the study and requesting their participation (see Appendix C).

Through purposive sampling, the Senior Director and the Associate Vice President provided a list of names they believed would help initiate the study. Their list encompassed positions of leadership within the World Campus including the directors from each subunit and University personnel who were involved with the development of the organization. Within days after the organization-wide email was distributed, I followed the introductory email with telephone calls to the individuals on the list requesting their participation in an interview. Table 3.1 identifies informants who participated in the study by their positions.

Table 3.1

<u>WORLD CAMPUS</u>	<u>PENN STATE</u>	<u>EXTERNAL AGENCY</u>
Executive Director	President	Sloan Foundation
Representatives from each subunit	Academic Deans, Department Heads, Faculty Members	AT& T
Members, Advisory Boards	Board of Trustees, Senior Administrators	Accrediting Agency
Support Staff and Students	Former Personnel and Students	Director, DE Organization

Data Collection Strategies

To capture data, I exercised three collection strategies: I examined relevant documents, tape-recorded semi-structured interviews, and observed specific behaviors and actions within the World Campus. Data collection was among the first procedures in this study. Before I met with World Campus leadership, I attempted to collect information about the organization by inquiring, e-mailing and speaking with World Campus employees. These individuals were cognizant of and intimately familiar with the intricacies of the organization and, more importantly, individuals with whom I had established relationships. Simply put, I knew these individuals; I worked with some previously and I asked for their assistance. During informal conversations around campus, I explained general concepts about the study and asked if they had textual or documentary references they believed would contribute to the study. I obtained memos, meeting minutes, end

of the year reports, and an array of agenda items primarily in e-mail format from thirteen World Campus and University employees.

Review of Documents

The documents helped establish a basis for conceptualizing the organization. Initially, I made no attempt to organize these items as my goal was simply to read and absorb the material. After weeks of reading, I gained a sense of who the decision-makers were, which departments were influential, the amounts of their respective budgets and how communication was transpired, interrupted or misinterpreted. As additional documents were collected they were separated and noted in a journal in accordance to if and how they contributed to the research questions.

Interviewing Process

After I acquired a working knowledge of the organization, I then met with the leadership of World Campus, requesting permission to begin interviews and observations. As previously explained in the Access section, the Senior Director of WC produced an organization-wide e-mail introducing me, the study and solicited their participation in the study. I followed the correspondence with phone calls and e-mails explaining the study and requested their participation in one-on-one interviews (See Appendix D). The hour and a half interviews were conducted in the informants' office or in a World Campus conference room. The study concluded with a total of forty-six informant interviews from the 120 World Campus employees (See Appendix E for interview protocol).

Once I confirmed fourteen informants, I began the interview process. The fourteen initial informants also recommended employees whom they believed would add value to the study. This referral and sampling process, snowballing, increased the likeliness "that the research methodology slices vertically through the organization, obtaining data from multiple levels and

perspectives” (Leonard-Barton, 1995, p. 40). With each completed interview, I acquired a better understanding of the organization and I was able to discern other positions and areas of interest requiring further exploration. Over time, as my role and research purposes circulated throughout the organization, more employees positioned themselves to interact with me and some requested and received interviews.

During a twelve-week span from September to November, I became a fixture within the World Campus. I interviewed and interacted with employees throughout the day and was granted a temporary workspace on site. While interviews and direct observations occurred regularly, I discovered a designated workspace encouraged employees to visit and share noteworthy events and updates. Typically, I arrived around 9:00 a.m. and, depending upon the interview schedule, I remained most days until 4:00 p.m.

Direct Observation

My belief and experience with direct observation has been more effective when I have been able to blend in or lessen the ‘outsider’ affect. The interview process, formal and regimented in some regards, did not expose the unwritten, spur of the moment, informal activities within the organization. To capture the feel of the organization and gather a sense of its culture, I participated in departmental meetings, birthday socials, joined hallway conversations and intentionally entered departments and personal offices to observe activities, interaction and communication. Unlike the interview process, there was no time limit or designated time frame set for observation. Regularly I visited, observed, and continued to follow-up, and verify information at the organization.

My observations, interviews and reading of documents provided insight on human resource practices, inclusive and evasive personnel interactions, selective policy and procedures

modifications, stated departmental goals vs. actual tasks, coordination practices and strategic planning. Data sources from all three modes included interview transcripts, field notes, online websites, World Campus archives, e-mail correspondence, letters, memos, speeches, program development agendas, announcements, minutes, progress reports, end of year reports, evaluations, news clippings, and articles.

Data Analysis

This study describes the social structure of a respected distance education organization. In an effort to narrow the focus on organizations, I selected among the three levels of organizational analysis: “1) the behavior of individual participants within organizations, 2) the functioning or characteristics of some aspect or segment of organizational structure, or 3) the actions of the organization viewed as a collective entity” (Scott, 1992, p.14). This study incorporates facets of the first and second level of analysis and details relationships, structural features and social processes that characterize the DE organization.

Analyzing data is “both the most difficult and least codified part” of the case study process (Eisenhardt, 2002, p. 17). As encouraged by Creswell (1994) and Bogdan and Biklen (1992) data were systematically and simultaneously managed during data collection and interpretation. Similar to many qualitative studies, this investigation produced a plethora of journal notes, cassette tapes and jump drives. While the accumulation of data was massive and rich, it required precise classification and interpretation to contribute to the DE knowledge base. To reduce data and make sense of it, I attempted multiple techniques to drive down the data, including de-contextualizing, re-contextualizing and common techniques from Miles and Huberman’s (1994) analytic manipulations:

- Putting information into different arrays
- Designing a matrix of categories and placing the evidence within such categories

- Creating data displays- flowcharts and other graphics- for examining the data
- Tabulating the frequency of different events
- Putting information in chronological order or using some other temporal scheme (Yin, 2003)

The specific procedures for analyzing data, which are described below, included a number of unsuccessful attempts to incorporate techniques described by Yin (2003) and Miles and Huberman (1994). Data analysis for this study involved three stages.

STAGE 1

In the first stage of data analysis, I employed open-coding techniques. These techniques involve grouping or categorizing phenomenon into similar patterns or themes (Merriam, 1998; Patton, 1990). Beginning with the research questions, I created a chart with responses to each question. The responses to the questions were acquired from interview transcripts and field notes which I composed during direct observations and from a review of documents. Under each question, I submitted key words, broad themes and groupings that seemed to fit the question logically.

For example, the research question, *How does the social structure of the Penn State World Campus affect its overall operations* produced many statements referencing the support and leadership of the University's President. Accordingly, the heading 'Institutional Support' was created for similar responses associated with that question. Open-coding was performed for all forty-two interview transcripts and journal entries. The last step in this stage included attempts to condense the themes or headings into conceptually congruent patterns (Glaser & Straus, 1967). The end product resulted in a significant reduction in groupings and similar concepts.

STAGE 2

The second stage of data analysis involved axial coding. Axial coding entails a series of procedures attempting to connect themes and groupings to foster new combinations of data (Strauss & Corbin, 1990). Using the themes from Stage 1, I attempted to compare those headings with the results from a qualitative software package N-Vivo. Using the software package, I cut and pasted my way through several pages of nodes, trees, similar sentences and related paragraphs, but I found myself spending more time learning the software than analyzing data. Additionally, I attempted to formulate matrixes identifying where connections might produce new thoughts and concepts. And lastly, I organized patterns and activities in reference to “support of” or “contradicts” the literature. Quite truthfully, while I accumulated a wealth of patterns and themes, I was not initially confident that the results were accurate. I struggled here for some time.

STAGE 3

I credit my breakthrough in data analysis to an escalating frustration with the cold weather and a mountain of fragmented data. I decided to escape from State College for the weekend and drive seven hours to North Carolina. Tired of hearing the same eight songs on the radio, I inserted an interview tape I had not listened to for some time.

While driving to North Carolina, I was my own captive audience. As I drove mile after mile listening to interview tapes, I began hearing similarities in the informants responses. I recognized where I should have followed some responses with different questions and allowed some informants to further expound on their thoughts. After several hours and several tapes, I began reformulating the study’s purpose. I reminded myself that this study was about understanding and describing the concepts of social structure. I returned to a familiar quote:

As people conform more or less closely to the expectations of their fellows, and as the degree of their conformity in turn influences their relations with others and their social status, and as their status in further turn affects their inclinations to adhere to social norms and their chances to achieve valued objectives, their patterns of behavior become socially organized (Blau & Scott, 2003, p. 5).

After driving for nearly eight hours and upon arriving at my destination, I created a new analysis chart. This analysis chart included the research questions, but more importantly, it included a grid on social structure. Using open-coding techniques, I grouped informants' responses and associated those themes with normative, behavior or cultural-cognitive structures.

For example, an informant responded, "We [World Campus] definitely have a traditional hierarchical organization, but we don't always operate like it, we all just do what needs to be done." The statement, in stage 1, was initially placed in the heading, 'Hierarchy of Authority/Operations.' From there, the heading was coupled with conceptually congruent responses concerning 'affect on overall operations.' In stage 3, the theme was referenced within the behavior structure and suggested: while informants describe the World Campus and an organization with a definitive hierarchy of authority and a clearly separate and competitive division of labor, the actual patterns of work activities and outcomes more closely align with a flattened hierarchical structure, similar to a new trend, the horizontal organization.

With this unorthodox technique, I accumulated several pages, charts and notes of relevant data answering the research questions more distinctly. Through the open systems perspective and concept of social structure, I could look at the organization and decipher the normative structure — what is supposed to happen — and record it, then examine what actually occurred to see if the two matched and if not, then the cultural-cognitive structure might begin to explain the disparities between what the organization says it does and what really happens. During my return drive, I rendered similar results. I listened to additional interviews tapes and again, I filled in the

new analysis chart. Throughout the winter from November through February, I listened to each interview tape repeatedly, grouping themes and determining where the actions and behaviors of the organization were consistent and inconsistent.

As a partial means to confirm accuracy and strengthen the study, I attempted to enhance validity, reliability and objectivity. To do so, I first incorporated multiple data sources. Additionally, I scripted the research procedures in detail; transferred and compared data from the analysis charts with the results from the software package; revisited data analyses from the software package and cross-referenced it with the new analysis chart on social structure; and lastly, asked for assistance from my committee members. These techniques yielded a more succinct, definitive and comprehensive display of data. In all, a goal for this study was to describe the social structure and these techniques enabled a series of characteristics, qualities and activities representing the organization to be effectively organized and identified.

Research Quality

I discuss quality in relation to the purpose statement. The purpose of the study is to describe the social structure of a DE organization; therefore, quality will be addressed and measured by how well it responds to this specific purpose. For example, does the description of the social structure reflect a complete and thorough analysis? Were the organizational subunits identified and their actions or ways of operation explained? In short, did this study do what it intended to do? The responses to these types of questions provide indicators of research quality. Therefore, given the myriad of means available to address research quality such as indicators, explanations and descriptions (Merriam, 1998, Yin, 1995); this study displays evidence of quality by effectively describing and identifying the characteristics of the organization's social structure as well as providing evidence of the contributing factors associated with a successful

distance education organization. Furthermore, to provide an illustration of quality, I demonstrate to the reader that:

1. The purpose of my study has been achieved;
2. I have spent sufficient time explicating what successful distance education entails;
3. I describe social structure;
4. I have described the research procedures; and
5. My outcomes and end products contain information relevant to researchers.

Methodological procedures alone are not the only evidence of quality. Research procedures and techniques “using a case study protocol, maintaining a chain of evidence, establishing a case study database and so on” (Yin, 2003, p.161), may produce a great technician, but not necessarily a great study. Again, this study discusses quality in relation to the purpose statement. To enhance the quality of this study, I was cognizant where necessary of Yin’s (2003) five general characteristics of an exemplary case study. The characteristics assert that the case must be significant, complete, considerate of alternative perspectives, display sufficient evidence, and composed in an engaging manner (Yin, 2003).

Following these criteria, this study produced a research product developed through ethical research practices and of meaningful quality. I demonstrated these characteristics by selecting a case (World Campus) that is renowned and continues to be recognized as an industry model; developing research questions aligning with the study’s purpose and goals; seeking and comparing supporting and alternating perspectives from the literature; and incorporating feedback from my committee members. Moreover, as the sole researcher, as much as possible I was conscious of and attempted to conduct this investigation with ‘value-free’ intentions. While I am not able to say to what extent this occurred, I can without reservation state that I described and explained ‘what was’ in the study and not what I expected to see or hoped to see.

Limitations

Limitations for this study pertain to research design. The case study research method has inherent limitations, particularly, methodological restrictions. Case studies have been cited for a lack of scientific generalization, essentially asking how can one generalize to larger populations based on one study. I eliminate this concern by not attempting to generalize to any specific population, but rather to propositions. This study seeks to contribute to the knowledge base and practice of distance education by offering considerations based on the success and difficulties of one American dual-mode research university.

Finally, data collection and analysis are vital strategies for case study research. Accordingly, limitations for case studies are generally more prevalent when “the case study investigator has been sloppy and has allowed equivocal evidence for biased views to influence the direction of the findings and conclusions” (Yin, 1984, p. 21). As a beginning researcher, I was the sole instrument of data collection and analysis. Consequently, the outcome and limitations of this case study directly relate to my ability and skill sets as an investigator. Presumably, more experience produces a better study. Additionally, because I have finite financial resources and a reasonable expectation to complete the study in a timely manner, the scope of this project may have been restricted. To combat these limitations, I relied heavily on the experiences of my committee members, used quality-enhancing techniques discussed earlier and provided detailed descriptions of my research procedures and techniques.

CHAPTER IV

Findings

The bottom line is that we are hard pressed to manage organizations in such a way that their benefits regularly exceed their costs (Bolman & Deal, 1991, p. 6).

Introduction

Organizational structure, work-related activities and relationships are the cumulative focus of this study. The focal point of this chapter describes how these activities and relationships are coordinated through the World Campus' various subunits and personnel. The chapter begins with a concise overview of the Pennsylvania State University and continues to describe the World Campus, explaining its origin and relationship within the Penn State academic and administrative structure. Following the overview, the remainder of the chapter responds primarily to the first two research questions.

1. *What formal organizational subunits and significant groups comprise the Penn State World Campus?*
2. *How do the subunits and significant groups coordinate their activities to produce organizational outcomes?*

The majority of this chapter identifies the World Campus' subunits and reveals its processes for developing and delivering programs; in essence demonstrating the organization's life cycle of innovation.¹³

The Pennsylvania State University

Established in 1855, The Pennsylvania State University was chartered as an agricultural college. Located in central Pennsylvania, the institution's initial goal was to foster scientific approaches in agriculture for Pennsylvanian farmers. Between 1855 and 1925, the needs of the

¹³ The final research question is discussed in the following chapter.

state and its citizens changed, requiring the Agricultural College of Pennsylvania to become more inclusive of utilitarian needs. As a result of these broader societal needs, the college began to transition, embodying a commitment to the land-grant mission, prioritizing undergraduate education, organizing outreach activities, and eventually, establishing a research presence.

During the 1930s with enrollments exceeding 5,000 and with increasing prestige, Penn State widened its geographical boundaries by incorporating multiple branch campuses across the state. Typically, these campuses offered two years of undergraduate instruction and today, they continue to serve students throughout the Commonwealth. Interestingly, these multiple Penn State locations were the product of the Depression and its associated economic hardships. Seeking resolution for student's financial pressures, Penn State constructed satellite campuses to allow students to work at home in their respective cities, eliminating the need for students to relocate to rural Pennsylvania. This unique model, twenty-four Penn State campuses attempts to "serve the mission of one University geographically dispersed" (Task Force Report, 1992, p. 11).

Penn State, along with Temple University, the University of Pittsburgh, and Lincoln University are not state-owned or private institutions, but they receive substantial state appropriations. Financially, while the state allocates over \$307 million to the Penn State (2004-2005 Operating Budget), the term state-related best describes the state and the institution's relationship. Today, The Pennsylvania State University, a dual-mode, public Research Extensive institution operates an annual budget exceeding \$2.6 billion, while serving more than 80,000 students at 24 locations, including a College of Technology, a Law School, a medical center, and a virtual campus.

The World Campus

Nationally recognized as a successful distance education organization (DiStefano, Silverman & Rudestam, 2004; Petrides, 2000), the World Campus serves as Penn State's primary delivery unit for online education. Its charge has been to "integrate [distance education] into the mainstream of the University, to conform in terms of quality, but also to transform in terms of pedagogy and delivery of instruction" (Report to Trustees, 2004, p.1). Since its inception, the virtual campus has made significant strides, expanding from an initial enrollment of forty-one, during the 1997-1998 academic school year, to encompass more than 6,200 learners with over 120 full and part-time employees in 2004 (Ryan, 2004). The World Campus' mission is to provide worldwide access to Penn State's academic programs and resources in a sustainable, technology-based learning environment (Report to Trustees, 2004).

World Campus Origin

Building on Penn State's 150-year history, the creation of the World Campus evolved partly from the University's experience in distance education. The University's gradual, but consistent success with correspondence initiatives, closed circuit television, and satellite broadcasts fueled the idea of expanding access to learners via distance education. Revisiting Penn State's commitment to outreach services and similar to its multi-campus concept, the University desired and contemplated the idea of centralizing distance education.

Initiated by James Ryan, Vice President of Continuing Education and Provost John Brighton, a Task Force on Distance Education was appointed March 31, 1992 (Task force, 1992, p. 4). Twenty-three members representing an array of academic disciplines and University personnel were assembled to 'explore and examine distance education at Penn State and in a national context' (Task Force, 1992, p. 5). The Task Force established:

There is a compelling case for Penn State to move aggressively and rapidly toward a position of national leadership in distance education. Our past, our basic

structure; our dedication to excellence in teaching, research, and service; and the current status of our infrastructure combine to give us a competitive advantage that should be exploited and capitalized upon to the benefit of both the University and the emerging community of learners who will seek education in the future (Task Force, 1992, p.11).

Favorable recommendations from the Task Force garnered grass root support to centralize distance education, but during the early nineties, attempts to launch a virtual campus were unsuccessful. Despite President Thomas' verbal acknowledgement supporting the 'concept' of distance education and agreeing that it was a good fit for the university, he implied distance education was not a high priority and unlikely to become a major initiative during his administration. Consequently, the movement to organize distance education did not immediately occur.

Four years later in 1996, a series of social forces helped expose and reposition the expectations for a virtual campus. First, a new president, Dr. Spanier arrived, advocating distance education and his commitment to pursue a virtual organization. Envisioning a distance education organization embedded within Penn State, President Spanier assembled a new study group on DE and charged them with creating a comprehensive implementation plan.

The fourteen-member Distance Education Advisory Committee, met over dinner for five months constructing and detailing an all-inclusive plan for a virtual campus. The distance education plan was guided and restricted by certain requirements, such as a not-for profit model and to serve in support of academic programs. As stated by President Spanier, "It was a financial plan, it was a time table, and we [Penn State] started with a marketing study where instead of asking the question what areas do we think we'd like to offer a degree in, we started with the question, what are the educational needs around the country that are not being met, but happen to match up with Penn State's areas of expertise." The committee's collaborative efforts produced a

DE implementation plan for the University encompassing the ideals of faculty, administrators and institutional buy-in.

Restructuring within the University became another factor that inadvertently, but significantly contributed to the establishment of the World Campus. Operationally, Penn State experienced a series of organizational realignments. Penn State Outreach, a new unit resulting from University realignments centralized the University's four outreach delivery units. Cooperative Extension, Continuing Education, Public Broadcasting and Distance Education were combined into one administrative unit. Although Penn State Outreach was originally intended to reduce duplicated programming efforts, its role became pivotal in framing how distance education would be delivered at Penn State.

Despite these three factors, supportive efforts from the President, the creation of Penn State Outreach and changing educational needs; the most difficult challenge for creating a virtual campus remained unaddressed – funding. Aware of the substantial costs to deliver and maintain an online environment, the University's leadership projected the resources necessary to create a virtual organization might exceed ten million dollars. Fortunately, grants from the AT&T Foundation and the Sloan Foundation provided several million dollars in start-up funding for infrastructure needs and faculty training. Two years later with a plan and resources, the World Campus was in operation, offering thirteen Penn State courses and certificates.

Physical Description

Although the World Campus is a virtual campus it occupies a physical location.¹⁵

Located a few minutes from the University Park campus in the Cato Park Commercial Plaza, the three-level office building houses more than sixty office spaces, conference and meeting rooms,

¹⁵ The following description serves primarily as a means to offer the reader a visual reference and does not factor into any investigative analysis.

and a break area. (See Figure 4.1).



[Figure 4.1 The World Campus, Cato Park]

The entry level is occupied by a mixture of registration and records employees, a designated student assignment drop off area, the subunit Student Services and administrative offices. The instructional design team fills the majority of the lower level, and the top floor is home to the subunit Data Management Services, program planners, additional meeting rooms and academic advisers. A new facility in the celebrated Innovation Park area is currently under construction.

The new facility opens May 2005. (See Figure 4.2).

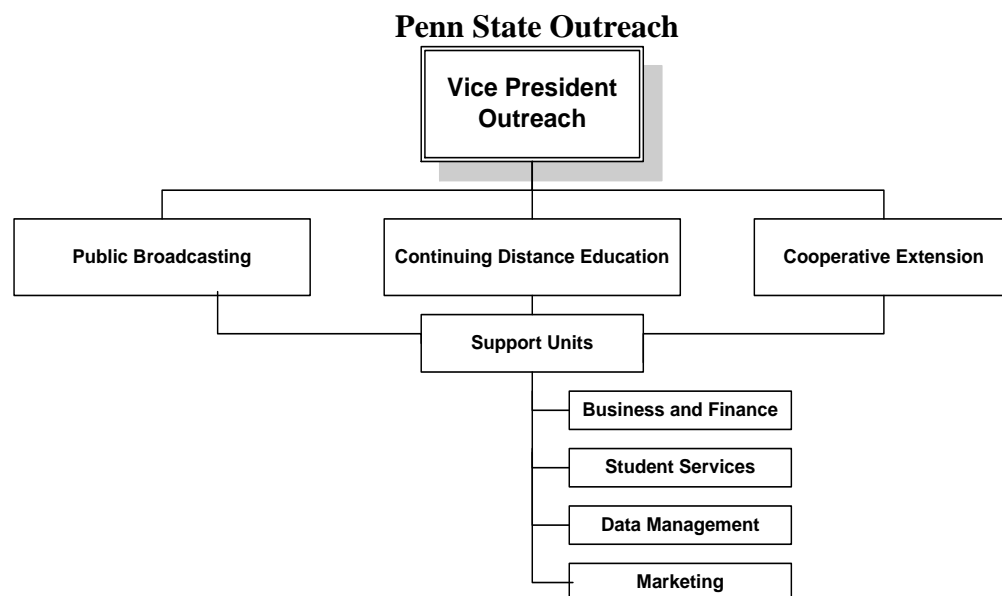


[Figure 4.2, The new Penn State Outreach facility, third home for World Campus]

Organizational Relationship within Penn State

In 2004, Penn State Outreach reassessed its priorities and organizational capabilities and decided to structurally consolidate two of its four delivery units. The two units, 'Continuing Education' and 'Distance Education' merged to form 'Continuing and Distance Education' with expectations of facilitating greater program support, reducing duplicated efforts and focusing more on credit programming. The World Campus resides within Continuing and Distance Education. (Figure 4.3 illustrates an abridged organizational chart of Penn State Outreach).

Penn State Outreach, the larger umbrella organization now operates three delivery units - Public Broadcasting, Cooperative Extension and Continuing and Distance Education¹⁶. The primary objective for Penn State Outreach is to provide leadership in economic, social, educational, and cultural issues not only for individuals, but communities, and organizations (Outreach Homepage). In collaboration with Penn State academic colleges, Outreach offers more than 2,000 programs and services each year.



¹⁶ At the time of this study a new unit, Economic Development was not yet finalized and Penn State Outreach continues to modify its organizational make-up.

[Figure 4.3]

The core activities of Outreach are carried out through its three programming and delivery units: Public Broadcasting, Continuing and Distance Education and Cooperative Extension. Penn State Public Broadcasting began as a small-market television station offering mostly educational programming. Today, Public Broadcasting includes WPSX-TV and WPSU-FM, a 24-hour listener-supported radio station and maintains one of the largest coverage areas in the nation.

Cooperative Extension interacts with over two million people annually, providing access to Penn State's resources in all Pennsylvania counties. Through local partnerships, Penn State extension agents, faculty and volunteers operate sports camps, conduct employment training and assist in financial planning. Lastly, Continuing and Distance Education, home to the World Campus offers a variety of courses, certificates and degree programs. Continuing and Distance Education offerings and content can be custom-designed and facilitated through conferences, workshops, institutes and specialty programs.

Part One Summation

The opening section of this chapter was written to familiarize the reader with the World Campus' origin, mission and relationship within Penn State. The subsequent section responds to the first and second research questions offering a more in-depth view of the World Campus' internal configuration, routines and methods of operation.

Research Question 1.

What formal organizational subunits and significant groups comprise the Penn State World Campus?

This question essentially asks, what we would find if we looked inside the distance education organization? What departments, division or subunits represent the organization?

Certainly, the models, units and internal configuration of successful DE organizations vary, but by identifying which subunits exist within the organization, we may begin to understand the manner in which the organization operates.

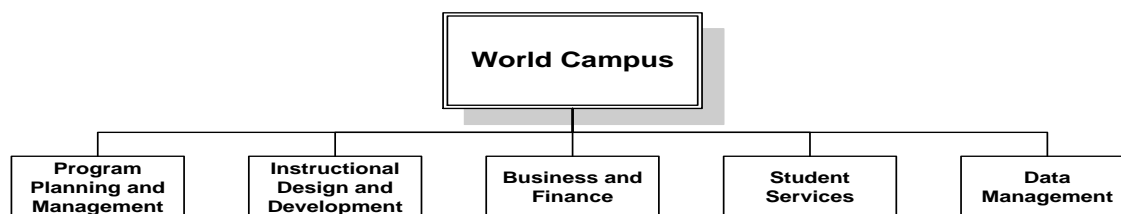
Cognizant that organizations are not arbitrary collections of people, but a meaningful combination of groups and individuals working together (Greenberg, 2005); the first research question also seeks to identify significant organizational groups. These groups may be formal or informal committees, teams or other assemblies considered instrumental and influential to the organization. The table below (Figure 4.4) identifies the subunits and significant groups associated with the World Campus's program development process, including a brief description of their responsibilities. Following the table, organizational charts of the World Campus, Continuing and Distance Education and Penn State Outreach reveal the reporting structure and relationships for these subunits.

Organizational Subunits	Roles and Primary Responsibility
Program Planning and Management (PP&M)	<ul style="list-style-type: none"> • Establishes relationships with academic units. • Facilitates the process of developing, delivering and maintaining World Campus programs.
Instructional Design and Development (IDD)	<ul style="list-style-type: none"> • Creates instructional products and courses. • Provides faculty training.
Data Management Services (DMS)	<ul style="list-style-type: none"> • Purchases hardware and software. • Designs administrative systems.
Student Services (SS)	<ul style="list-style-type: none"> • Responsible for student registration, student records, call center, academic advising, and maintains help desk.
Business and Finance (B&F)	<ul style="list-style-type: none"> • Maintain budgets, human resources • Determines the cost of business and services.

Marketing	<ul style="list-style-type: none"> • Conducts research • Assess potential program and student markets, • Develop awareness strategies and purchase media.
Significant Groups	Roles and Primary Responsibility
Distance Education Management Team (DEMT)	<ul style="list-style-type: none"> • Senior leadership, • Macro decision-making body and strategic vision.
Program Review Team (PRT)	<ul style="list-style-type: none"> • Includes various representatives, • Reviews, accepts and denies potential programs, • Determines World Campus offerings.

[Figure 4.4]

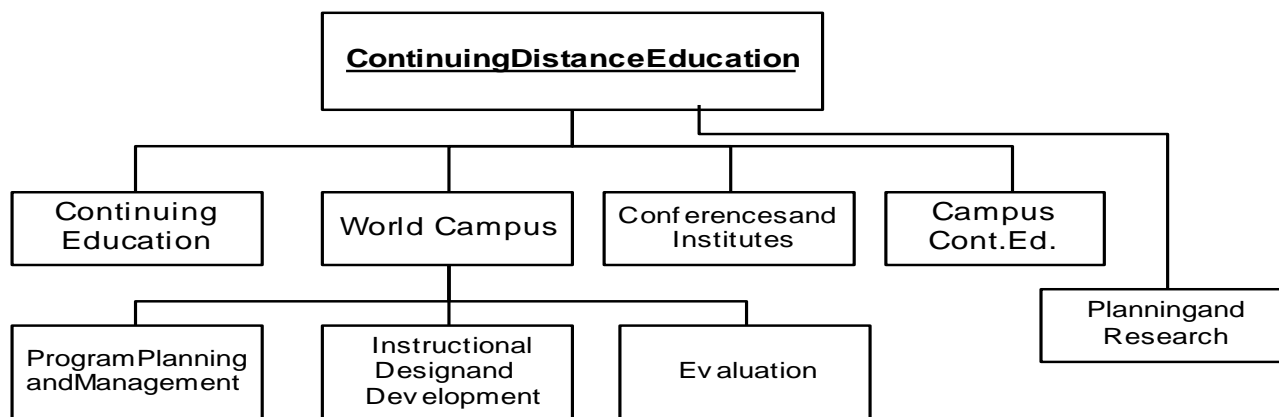
During the time of this investigation the World Campus recently completed an organizational realignment in conjunction with the restructuring of Penn State Outreach. Prior to the reorganization the World Campus included five subunits: 1. Program Planning and Management, 2. Instructional Design and Development, 3. Business and Finance, 4. Student Services and 5. Data Management Services. [See Figure 4.5]



[Figure 4.5, World Campus subunits prior to reorganization]

Since the reorganization, the World Campus officially recognizes three subunits: Program Planning and Management, Evaluation, and Instructional Design & Development. Figure 4.6 displays the organizational chart of Continuing and Distance Education and the new subunits for the World Campus.

Continuing and Distance Education

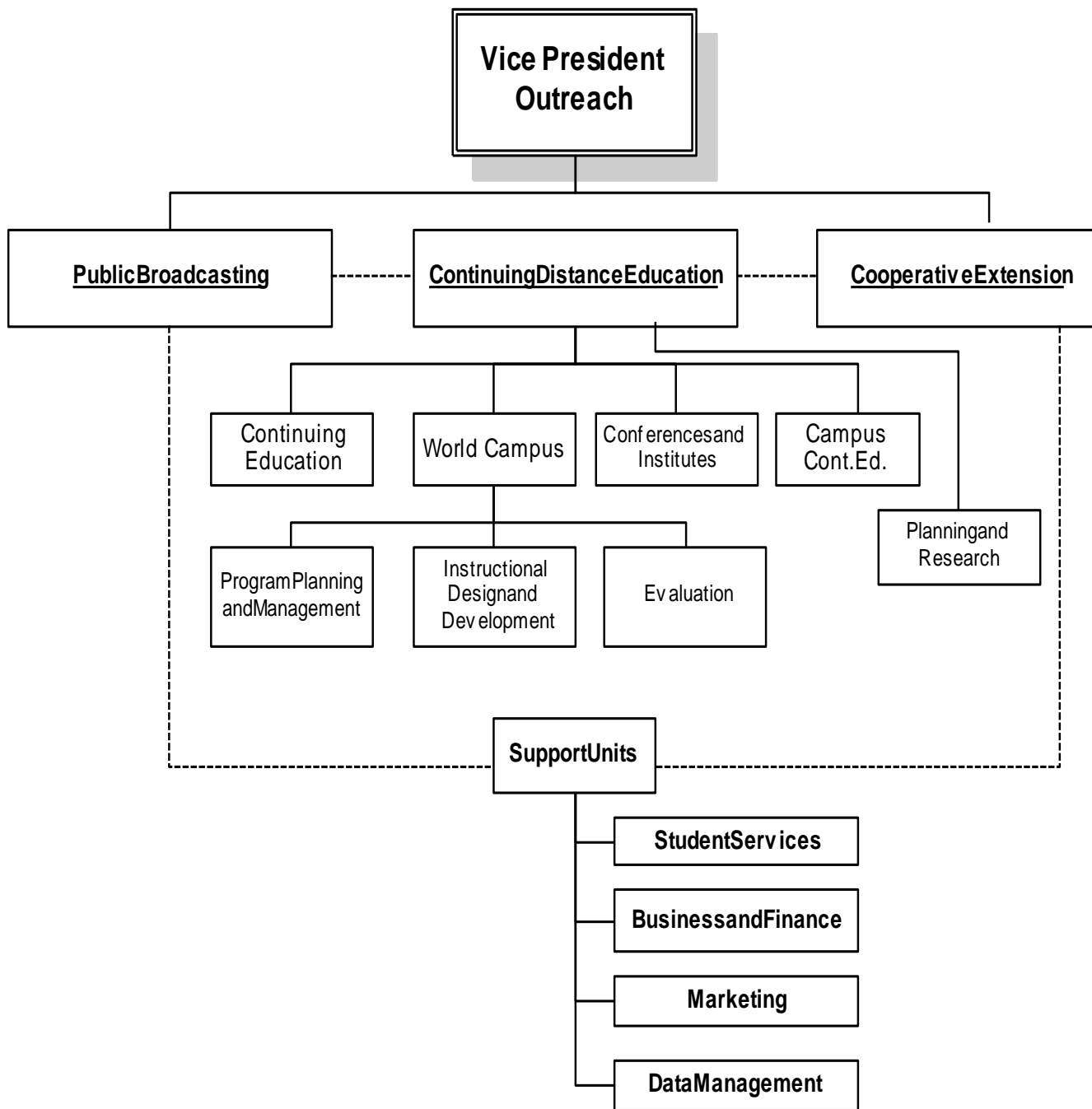


[Figure 4.6, Current structure of World Campus with three subunits; Continuing & Distance Education]

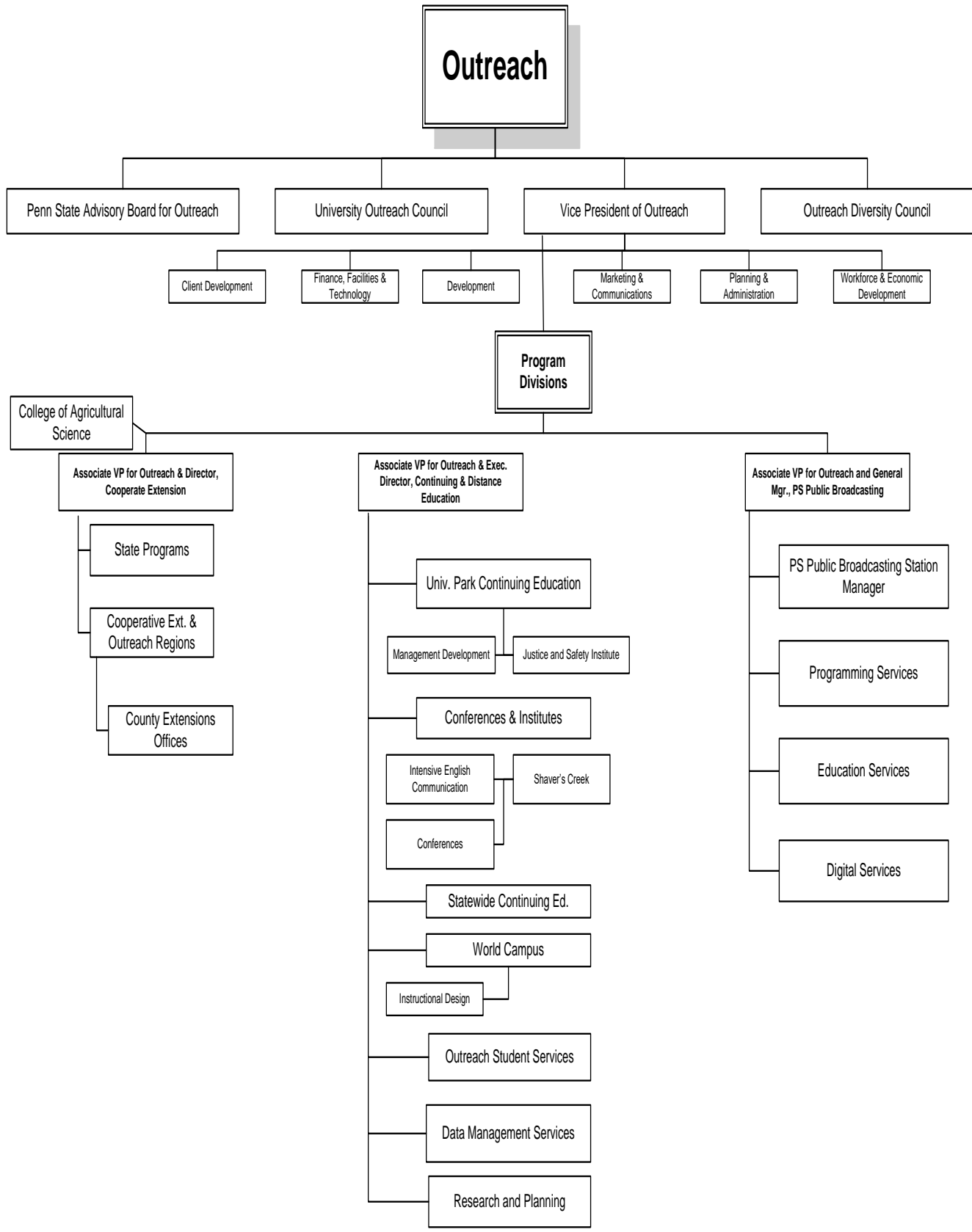
The former units (Student Services, Data Management Services and Business and Finance) still contribute to World Campus' program development process, but those units have been redirected to serve a larger supporting role for Penn State Outreach.

The organizational chart below (Figure 4.7) displays Penn State Outreach during the time of the investigation. As stated earlier, Outreach manages three primary delivery units, Public Broadcasting, Continuing and Distance Education and Cooperative Extension. The Associate VP for Outreach & Executive Director of Continuing & Distance Education, supervises, four units, Continuing Education, Conferences and Institutes, Campus Continuing Education and the World Campus. The World Campus operates three subunits, Program Planning and Management, Instructional Design and Development and Evaluation. Multiple subunits support all of the divisions within Outreach, including but not limited to, Student Services, Business and Finance, Marketing and Data Management Services.

Penn State Outreach



[Figure 4.7 Abbreviated organizational chart of Penn State Outreach]



[Figure 4.8 Current Organizational Chart of Penn State Outreach]

Research Question 2

How do the subunits and significant groups behave to produce organizational outcomes?

Developing, Delivering and Sustaining World Campus Programs

Part two of this chapter describes the process for developing online programs. Beginning with only an idea for a proposed program and continuing through approximately five distinct stages, the development process entails transferring an idea into a conceivable plan and culminates when the set of courses becomes Penn State certificates and programs¹⁷. Generating programs remain a fluid process, and as this section demonstrates; the process often deviates from the prescribed course of action.

Therefore, the aim for this section fulfills two purposes: First, this section aims to illustrate the sequence, coordination and interaction among World Campus subunits and significant groups necessary to identify, develop and delivery programs. Secondly, this section aims to discern through the normative, behavior and culture-cognitive structures the disparity between the stated goals and expectations of each step, and the reality of what actually occurs; and lastly, offer an explanation that accounts for such discrepancies.

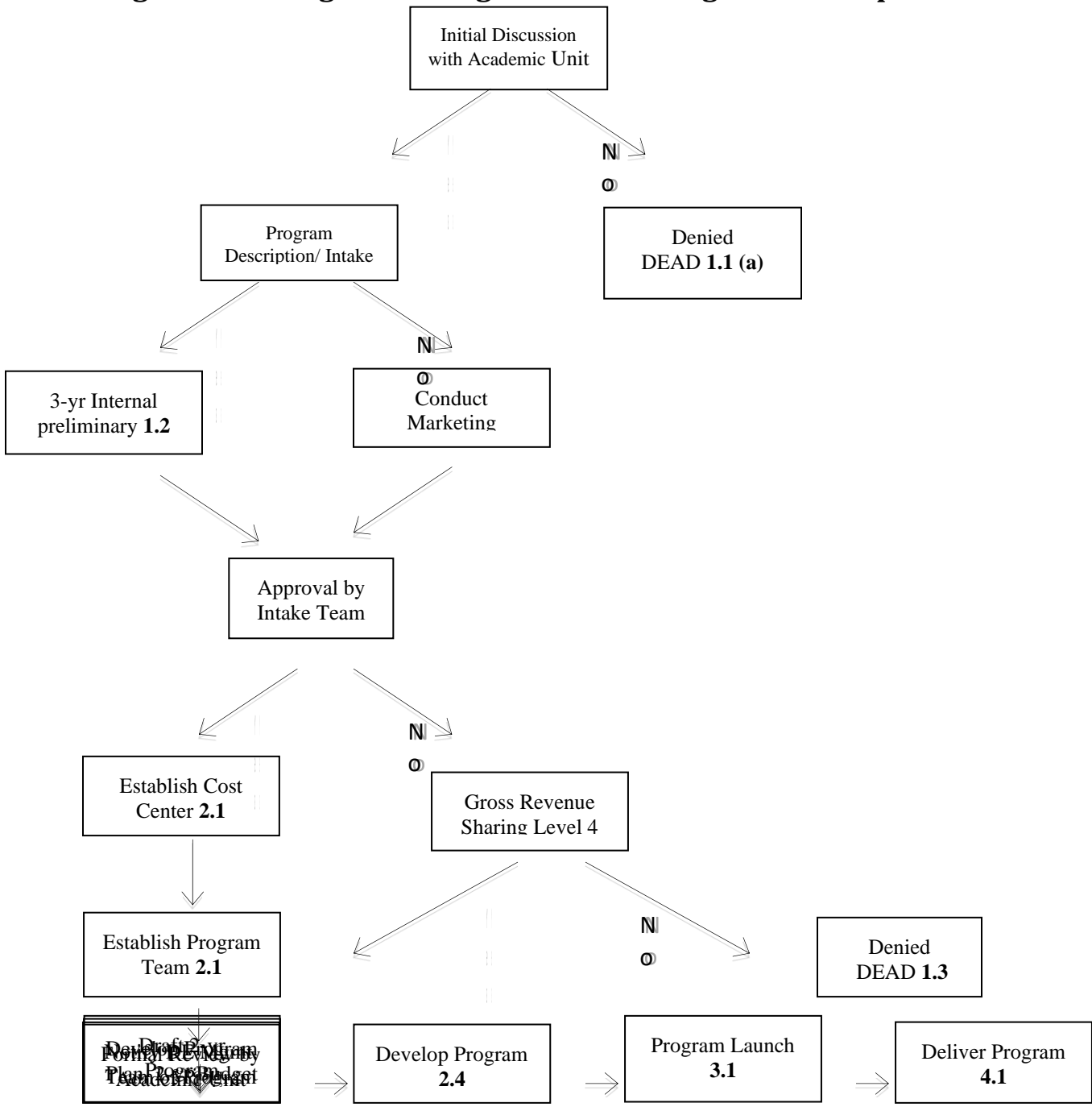
Program Development Process

Tables 4.9 and 4.10 replicate the World Campus New Program Process. Each step in the process corresponds with a number (1.3, 2.3 etc) explaining the prescribed activities associated

¹⁷ The five stages in the program development process do not represent an official World Campus classification. These stages were created based on interviews and observations of the development process and categorized according to major themes.

with that particular phase.¹⁸ Following the World Campus process, I offer another perspective on the same process, allowing elements of the social structure to guide the findings.

Program Planning and Management New Program Development Process



¹⁸ Legend: AU- Academic Unit, GRS – Gross Revenue Sharing, PM – Program Manager, WC – World Campus, RI – Resident Instruction

1. Program Discovery

<p>(1.1) Program Manager (PM) discusses program idea with faculty member(s), program PIC, department head, and/or outreach associate dean, as appropriate.</p> <p>Possible Outcomes from (1.1)</p> <p>(1.1A) If program idea does not appear to have strong online possibilities, PM notifies Academic Unit (AU) contact that WC is not the appropriate Outreach unit. The process is now dead.</p> <p style="text-align: center;">-OR-</p> <p>(1.1B) If program idea appears to have strong online possibilities, then a faculty contact is identified and a Program Description/Intake form is solicited. Gross Revenue Sharing (GRS) Levels are included in the Intake Form for faculty contact to select.</p> <p>Faculty contact, department head, and outreach associate dean sign completed Program Description/Intake Form to indicate AU support before sending it to PM. After, the process moves to step (1.2).</p>	<ul style="list-style-type: none"> • If PM determines the program idea is not a match for the World Campus, PM may explain to AU contact that it failed to meet some or all of the following criteria: <p>Scalability General viability/marketability Faculty depth Readiness DE applicability</p> <ul style="list-style-type: none"> • As needed, PM reviews Program Description/Intake Form with faculty contact to solidify program idea so PM understands the proposed program. • PM informs faculty member(s), department head, and/or outreach associate dean of process under which program idea will be reviewed and anticipated timeline, orally or in writing (preferred).
<p>(1.2) PM and Program Assistant draft three years of internal preliminary budgets based on Program Description/Intake Form including GRS Level selected by Faculty Contact.</p> <p>PM requests market research for program viability. After, the process moves to step (1.3).</p>	
<p>(1.3) PM calls for Program Review Meeting by notifying: Sr. Dir. of World Campus, Dir. of ID&D, WC Marketing Strategist, ADO-PP&M (Assoc. Dir. for Operations, PP&M), PM). Intake Team's recommendation will include GRS Level(s).</p> <p>If Intake Team determines the program idea is not financially viable or within the mission of the World Campus, it can recommend GRS Level 4, where AU funds the costs of the program.</p> <p>If AU does not accept Level 4, then the process is dead</p> <p>If AU accepts Level 4, or if the Intake Team determines the program idea is financially</p>	<ul style="list-style-type: none"> • PM ensures Team members have Program Description/Intake Form and any other relevant information when review meeting is scheduled. • PM provides written feedback to faculty contact, department head, and outreach associate dean as per discussion in Program Review Meeting, with copies to Intake Team. Face-to-face meeting with appropriate AU contact(s) is advised. • If GRS Level 4 is recommended due to concerns about the program's financial viability, the AU may decide not to pursue the program further. If possible, the PM will request this decision in writing from the AU.

<p>viable and within the mission of the World campus, then the process moves to (2.1).</p>	<ul style="list-style-type: none"> • There is no need to share the complete budget with AU unless it is requested or if the World Campus is rejecting the program. GRS Budget will be shared with the AU as part of the Program Plan and Program Agreement.
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2. Program Plan Development	
<p>(2.1) PM and/or PA establish cost center with Business & Finance Office (BFO) and assign time tracking.</p> <p>PM establishes a program team, working with the appropriate supervisors in each WC unit to identify team members.</p> <p>PM and PA work with Faculty Contact, and others from AU and WC as needed, to develop a Program Plan, including GRS level (see criteria in Program Agreement Templates). Program Plan is valid for two years.</p> <p>PM and PA refine two years of budgets based on Program Plan.</p> <p>PM clears Program Plan and draft budgets with ADO-PP&M and SrDWC.</p>	<ul style="list-style-type: none"> • PM shares drafts of Program Plan with Faculty Contact as it is developed to ensure AU input and concurrence.
<p>(2.2) PM and PA draft 2-year Program Agreement and secure internal clearances on final version and first year budget by ADO-PP&M, BFO, and SrDWC. (Program Plan is appendix in Program Agreement.)</p>	
<p>(2.3) PM and PA facilitate formal review of Program Agreement by AU and secure AU signatures.</p> <p>SrDWC and AVP will sign Program Agreement after AU signatures secured.</p>	<ul style="list-style-type: none"> • PM signs Program Agreement and shares it with Faculty Contact so it can be cleared and signed by AU (i.e., Faculty Contact, department head, and outreach associate dean).
<p>(2.4) PM and PA notify Distance Education Mgmt. Team of Program (see SrDWC to get on Agenda).</p>	

3. Program Development	
<p>(3.1) The PM, with the support from the PA and program team, manages program development as per approved plans, agreements, schedules, and budgets. (GRS Level 4 may be a unique plan with PM coordinating between AU and WC.)</p>	<ul style="list-style-type: none"> • PM discusses program development issues with ADO-PP&M. ADO-PP&M, PM, or both then take issues to SrDWC as needed.

4. Program Delivery	
<p>(4.1) Program Launch is held to familiarize all interested Outreach members with the new program.</p> <p>The PM, with the support from the PA and program team, manages program delivery as per approved plans, agreements, schedules, and budgets.</p>	<ul style="list-style-type: none"> • PM discusses program delivery issues with ADO-PP&M. ADO-PP&M, PM, or both then take issues to SrDWC as needed.

[Table 4.10 Program Process Narrative]

This portion of the chapter represents my findings regarding the Program Development Process.

Step 1 - Program Discovery

Normative Structure

The primary goal for this step, Program Discovery, involves PP&M interacting with representatives from Penn State academic units to identify potential World Campus programs.

Hypothesizing ideas is the first step in the program development process. Potential program ideas can originate from Penn State academic units, external constituents and the World Campus. Typically, as its name suggests, Program Planning and Management (PP&M) initiates Step One. To discover potential programs, program managers from PP&M meet with faculty members, Deans and department heads to discuss educational interests. During their discussions, a program manager might ask the Dean: “Do you believe any of your programs are suited for e-

learning? Are there markets your college would like to explore? What are your strongest programs and how might faculty feel about delivering instruction online? Our market research indicates that a master's degree in business would be of interest to a large audience. What are your thoughts?"

Primarily, this program discovery stage consists of open discussions; it's an informal exchange of ideas between representatives from the World Campus and academic units. Again, the underlying goal for this stage is to examine the potential for program delivery or to identify a need that can be serviced by the World Campus.

Behavior Structure

The stated activities of Step One closely align with the behavior structure. Because this step only seeks discovery or identification of potential programs, which can originate from a number of sources, this step usually remains consistent.

Participants Involved in Step 1

Step one introduced the subunit *Program Planning and Management*. The responsibilities for PP&M include guiding potential programs through a review process; determining the program's viability for success, and if developed and delivered; PP&M maintains and manages the online program through course upgrades or if necessary, program elimination.

PP&M employs a Senior Director, Associate Directors/Program Managers, Program Assistants, a Coordinator of Faculty and Student Affairs, a Special Assistant for Administration and Staff Assistants. The Senior Director also retains the title and responsibilities of the Director of Program Planning and Management. This dual role empowers influence over program offerings, spearheads curriculum development while maintaining general oversight for World Campus operations. Associate Directors manage programs with additional responsibilities in

evaluation, international and special projects, blended learning and campus relations and operations.

Program managers serve as points of contact for the World Campus fostering relationships with academic units. Recall, the World Campus is a delivery component that must partner with an academic unit to offer programs; therefore developing working relationships with these units remain priority. In conjunction with academic units, program managers work as liaison to identify, develop and deliver respective programs through the World Campus.

Step 2 - Deciding Viability of the Proposed Program

Normative Structure

A number of World Campus criteria determine if a proposed program will be developed.

The next step in the program development process, *Deciding Viability*, aspires to gather more information about the proposed idea. The goal for this step is to determine if the idea (proposed program) warrants further consideration into the development process. After conversations between the program manager and the academic unit, a Program Description Intake Form (Appendix F) is dispersed to the partnering academic unit. The Intake form helps Program Managers decide viability by recording pertinent information and helping to initiate a broader level of conceptualizing the proposed program. The form requests information such as: what are the required courses, which faculty members will teach the courses, how many credits will fulfill the requirement, what is the projected start date, what are the enrollment assumptions and the method of delivery?

If the Intake form is returned from the academic unit, the respective program manager evaluates the form for completeness. Based on the form's data, the proposed program is evaluated in respect to World Campus program criteria (Appendix G) assessing scalability,

faculty depth and applicability to distance education. At this point, the proposed program can be denied, modified or given consideration to be developed by another Penn State Outreach delivery unit. If the proposed program satisfies the established criteria, the program manager and assistant draft a three-year budget and solicits a preliminary assessment and market research from the marketing division.

The marketing division conducts research on the potential program scanning for competitors and seeking answers to the following salient questions: Are other institutions offering this program? Who are they and how many similar programs currently exist? How large and strong is the employment need in this particular field? Who is the potential audience? Is the market large enough to sustain a program for several years? How do we market this group, where do we market learners and what might attract them?

If the market research appears favorable, the program manager requests a meeting with the Program Review Team. The Program Review Team, a World Campus evaluative group consists of the Senior Director, Director of Instructional Design and Development, a Marketing Strategist, Associate Director of Operations and a Program Manager. The review team meets to discuss the viability of the proposed program and to evaluate the program's fit in accordance to the World Campus mission and to determine the program's financial feasibility. If the review team determines the program is not viable, the academic unit is contacted – in many instances to revise costs, or explain the audience is too narrow, or to explain that the learners may have an inability to pay for the program. If a new agreement is not made the proposed program is denied. However, an approval by the review team ushers the proposed program forward where a Program Plan is developed (Appendix H).

Behavior Structure

Deciding the viability of a program is not restricted to the review team's approval process or other designated criteria.

Deciding viability and regimenting an approval process is intended to reduce the number of canceled programs, increase the likeliness of meeting enrollment and cost projections and ensures a portfolio of quality programs. While these expectations were commonly expressed by World Campus employees, the reality of how programs are decided upon remains contingent upon a number of factors.

An informant working in a World Campus leadership position explained:

I wish we could get to a point where we could just be honest about things and with each other. We have many criteria, checks and balances to hopefully make sure we offer programs that will be successful and generate revenue. The reality, well my perspective is that we have programs that should have never gone beyond conversation. They exist because someone influential or someone who knows the right people said this is a great idea for World Campus.

Another World Campus informant stated:

We sometimes develop programs despite knowing in advance they will become a drain of our resources. We call them political programs because of the politics that come with them.

Cultural-Cognitive Structure

The World Campus must partner with academic units to offer programs and to strengthen these relationships; some programs have been sacrificed or conceded to cultivate a better working relationship with the Colleges.

A Penn State informant responds:

When the World Campus first started, they were looking for anyone and everyone who would play. They didn't have prestige or lots of money – quite the opposite

and to get departments to participate, they said yes to some courses just to build trust with a particular college or Dean.

When asked about political programs an informant stated:

We've gotten better with them, but sometimes you've got to give a little to get a little. If we know a 'suspect' program came from the top or from another higher source, we just accept it and try and do the best we can with it. We have even gone so far as to give awards to some programs that we all know needs to be disbanded.

Subunits and Significant Groups

Step Two introduced the subunit *Outreach Marketing and Communication* and a significant group, the Program Review Team. Outreach Marketing is a sixty-member full service marketing organization that develops marketing strategies, purchases media and conducts research. The organization remains a support unit for Penn State Outreach and offers an array of services. Their research division examines markets relating to new program development. The analysis group performs post enrollment reporting by calculating conversion rates - the percentage of people who visit World Campus's web page vs. those who actually convert, apply or enroll as students. A creative services unit including graphic designers, writers and website developers build and support World Campus websites and produce all World Campus printed materials. Outreach Marketing and Communication also operates a news bureau that performs public relations duties.

The Program Review Team, a small group consisting of Associate Director/Program Managers, World Campus senior leadership and directors collectively considers a program's financial and academic viability. The Program Review Team decides if the program will become

developed and instituted for delivery. The review team is fairly new and evolved from the notion that programs ‘should’ go through an evaluation process and meet certain criteria and quality measures. The review team meets as necessary and recognizes that its decisions influence the direction of the World Campus and its portfolio of programs.

Step 3 - Developing a Program Plan

Normative Structure

Before World Campus programs are developed, they are methodically and strategically conceptualized on paper. Program managers along with representatives from the development team and Student Services perform due diligence by forecasting costs, predicting enrollments and securing academic approval and clearances.

After a program idea receives approval to continue in the development process, more interaction and input is received from the remaining World Campus subunits. Step three, *Developing a Program Plan* aims to produce a more comprehensive budget and detailed document outlining the propose program’s specific information. Table 4.9, depicts the information and components necessary to complete a Program Plan.

PROGRAM PLAN TO INCLUDE THE FOLLOWING COMPONENTS

- Introduction/Brief Program Description
- Program Team (Gross Revenue Sharing (GRS) Levels 1-3) or Liaisons and Communications (GRS Level 4 only)
- Logistics for the two-year period -- *Items 1-3 typically are presented in narrative and chart form*
 1. Planned course development and roll out schedule
 2. Course instructor assignments
 3. Anticipated annual enrollments by course and program
 4. Who has operational responsibility for student academic advising
 5. Course start dates
 6. Program unique/specific agreements that need to be in writing
- GRS Sharing Level specified
 1. WC costs the academic unit will pay from it share of gross revenue (GRS Level 4 only)

Table 4.9, Program Plan Requirements

The following overview is fictitious and serves only as an abbreviated example of a Program Plan.

Master’s degree in Homeland Security

The M.Ed. in Homeland Security is a 30-credit master's degree, which will open in the summer of 2006. The degree includes a core of nine credits, a specialization or emphasis of 15 credits, and at least six credits of advisor-approved electives.

The core of the program is comprised of three courses (i.e., HLS 550, HLS 560 and HLS 421). Students who complete the core courses and are accepted into the M.Ed. enter a pool out of which student cohorts will be formed for completing the specialization/emphasis course work (HLS 501, 551, 553, 563, 596).

The actual Program continues and details more information concerning timelines and costs. After the Program Plan is completed, a Program Agreement form is created for the academic unit (Appendix I).

A Program Agreement form is effectively a contract between the academic unit and the World campus. It contains similar information as the Program Plan, but the *Agreement* form spells out the specific responsibilities and expectations for each party. More precise budgets are calculated, revenue sharing statements are finalized and *Business and Finance* begins time tracking (a self-reporting calculation of the time assigned to specific development tasks). Once the Program Agreement form is completed and all internal and academic clearances secured, the document is signed by the appropriate personnel (Sr. Dir of World Campus, Dean, Department Head, etc). The document confirms both parties are in agreement and the development process continues. The program manager with approval to proceed notifies the *Distance Education Management Team* and assembles a program team that will be responsible for bringing the proposed program to life.

Behavior Structure

The normative structure states, before World Campus programs are developed, they are methodically and strategically conceptualized on paper. While the statement is true, it does not apply to all programs. Often, early in the development process, programs that are believed to be a 'go,' fast-forward through a few of the development processes, which rearranges the sequence of prescribed activities.

A Program Plan can be equated to the blueprints in the construction industry. It is the document that explains the details. General contractors are not likely to order lumber and begin framing a house without knowing where to build, what to build, or what their costs and returns will yield. The same concept holds true for the Program Plan and the World Campus. Online programs are not simply developed, and uploaded hoping students will enroll. There is ample planning involved.

On occasion however, the ‘should do’ activities are frequently substituted with an ‘it will all work out in the end’ attitude. For example, when asked about the time frame between Step Two and Step Three, a World Campus informant responded:

That’s kind of hard to answer...it depends. If it’s a program with a healthy relationship between us and the college, then we can sort of skip around some of the protocols.

Another informant stated:

Sometimes it takes so long to get people to agree or make a decision, that if I feel it [the program] is go, I will have my folks start to look at what needs to be done. Its kind of funny, it takes forever for them to reach an agreement but our deadlines don’t change and we have to meet them.

When asked about the consequences of not adhering to the Program Plan, an informant said:

I remember when you were interviewing [a position of World Campus leadership] and he said, Nothing, absolutely nothing will proceed until we have a signed contract from the academic unit, ...we cant waste our resources like that anymore” do you remember that?

Well, you know that is not true, in fact, I don't think we could survive if that were true.

Cultural-Cognitive Structure

Developing online programs requires enormous amounts of coordination and effective exchanges in communication.

The disparity between the expected procedures and the actual activities might be partially explained by unclear boundaries, perceptions of where decisions are made and the prolonged time it takes to make decisions.

Commenting on the pace or turnaround time to develop a course, a World Campus informant said:

People say we are this great organization and we are, but we have the same problems as any organization. We are slow at times, indecisive, but we seem to succeed in spite of ourselves. The reason why, well, one of the reasons we can produce a product [online course] without dotting every 'i' or crossing every 't' is that we have been doing it for so long now. We have great people in place who can recognize where a problem will affect another unit and do something about it.

Elaborating on the development process and the specific procedures before and after the creation of the Program Plan, an informant stated:

Honestly, we don't always have time to go by the book. We try our best and it works out well sometimes...but we have multiple projects in development at the same time and we have to keep up. And we have to be conscious of the staff's workload. Sure, we have rules and procedures and we abide by them, but the Program Plan is a piece of paper. We don't market that sheet of paper and we

don't make money from that either. We have to create, develop and maintain and those things cannot always be directed from above.

Subunits and Groups Introduced in Step 3

The World Campus *Business and Finance Office* departed from the World Campus structure and was expanded to encompass other finance duties for Penn State Outreach. Through a direct relationship with the Penn State human resources office, the primary responsibility for Business and Finance is to maintain the financial and accounting needs of the World Campus. They also predict the costs of World Campus services by developing rate cards. Rate cards are intended to establish the amount of time and fees necessary to develop, deliver and maintain programs. For example, rate cards help predict the number of man hours needed to develop a course, calculate the hourly rate or percentage of salary required to develop that course, and based on number of courses and their respective costs, the total costs to develop a particular program can be estimated.

The *Distance Education Management Team* (DEMT), a decision-making body consisting of management and leadership positions convenes to address macro-organization and strategic issues. The group does not directly influence World Campus daily operations. Instead, they are assembled and operate in the fashion of an advisory board.

(Note: The elapsed time from the initial contact with the academic unit to the creation of the Program Plan can vary from two months to a year or more.)

Step 4 - Program Development

Normative Structure

The Program manager supported by the team manages and coordinates the development process.

So far, the program development process entails conceptualizing, organizing and working through logistical issues. There has been interaction among individuals within various subunits, which was necessary to develop the Program Plan, but for the most part, as one informant noted, the program exists on paper. Now that the academic unit and World Campus have reached consensus on their obligations and signed the agreement form, the development of the product (courses) begins.

The Program manager convenes a team to develop the program, including all courses, support mechanisms and publicity. The program team, headed by the program manager, includes the lead faculty member, a lead instructional designer, a Student Services advisor, a Marketing associate and on occasion associates from Business and Finance and Data Management Services. Collectively, this group is responsible for ushering the program through the remaining stages of the development process.

The program manager guides the six- or seven-member program team in accordance to the timelines and expectation of the Program Plan. Because members of the team represent various subunits, the team approach to program development begins with assigning tasks. The responsibilities for each person are distributed according their area of specialty. For example, one assignment is to develop the courses and materials for the program. Generally, instructional designers, faculty authors perform these tasks while another set of assignments might call for a marketing plan, which would be assigned to the marketing associate and his or her resources. The Program manager remains responsible for facilitating and coordinating all the activities and other tasks in accordance with the Program Plan's schedules and budget.

Behavior Structure

Program managers are charged with escorting programs through the development process, but without any direct authority over the personnel in their team, disagreement

and controversy becomes difficult to resolve and assigning specific responsibility can become difficult to delegate.

The Program manager maintains responsible for ensuring the team design and develop instructional content, train faculty, create publicity and solicit learners for the program, however, these teams do experience challenges.

Describing the development cycle, an informant responded:

Although members of this... program development team work to bring these courses and services to life, you have to understand that we all have other responsibilities in our own divisions. Sometimes my Director's goals and needs change my obligation...or may cause me to change my priorities within the team.

Commenting on the difficulty associated with managing the team, an informant stated:

When you really think about it, we are asked to manage, motivate and hold accountable, people who we have no direct authority over.

Cultural-Cognitive Structure

What the development process calls for and how the reality of those actions are then achieved may be explained by shared responsibilities and conflicting reporting structures.

Responding to the question, what would make the development process better, an informant offered:

I'm sure you'll come to realize that our reporting structure is. ...I'll say, kind of awkward. We have the Senior Director for the World Campus who, theoretically is in charge. Then we have Directors for each unit and Associate Directors and so forth for each of our five units. Because of egos or past relationships and this is before all the transition, we have Directors in the World Campus reporting to

[John Doe] and they are no longer here...or some feel because of their seniority, they shouldn't have to report to certain people.

When asked to describe the structure and relationships within a particular subunit, an informant stated:

Well it's a very collegial relationship. There is not a reporting structure. None of the [members in the subunit] report to me, ... That was a decision, we contemplated whether we should put in that kind of organizational structure, but the decision was made that there are other things that needed the expertise I could bring to them.

(Note: Development time ranges from one semester to two years.)

Formal Subunits and Significant Groups

Instructional Design and Development

Instructional Design and Development (ID&D) operates as a full-service faculty development, materials and content creation unit. Their primary function is to partner with faculty to conceptualize, design, and develop courses offered through the World Campus. ID&D employs a staff of thirty-five, including directors, instructional designers, instructional print designers, editors, graphic artists, production assistants, instructional technologists, multi-media developers, and technical typists. In addition to creating the academic product, ID&D in some instances identifies textbooks and calculates enrollment projections.

Student Services

The major goal for Student Services is to support learners as they matriculate through courses, programs and other Outreach offerings. Student Services operates a toll free call center, distributes an information catalog, provides pre-admissions counseling and conducts student

advising. As summarized by the director, “Student Services aspires to be a one-stop shop for learners and learner needs” (McGrath). Five core divisions of Student Services (Call Center, Admission, Advising, Registration and Records and Technical Support) serve World Campus.

Step - 5 Delivery

The last and perhaps one of the least difficult steps in the program development process is Delivery. Generally, a program is ready for delivery when the first series (2-4) courses are complete. The program’s newly created courses are sequenced according to their roll out date and as the first series of courses are being offered, the remaining courses are still in development. Before courses go public, an implementation meeting is scheduled with the developers, program assistants and Student Services representatives.

The purpose of the implementation meeting is to meticulously confirm all the appropriate program information to assure the courses are ready to receive enrollments. The group incorporates an Activity Form as a check-off list to assure course readiness. The group confirms the availability of appropriate textbooks and material, validates enrollment minimums and maximums, verify tuition rates, list course assignments, corroborate how assignments will be submitted and details software requirements.

If needed, the group corrects any inconsistencies and completes any unfinished tasks. Next, Student Services enters the completed courses into their database, posts the program on the World Campus’s website, notifies Penn State bursar, publicly opens the program for student registration and collects tuition and fees. Student Services assumes the lead from this point serving as the first line of contact for students. They register students, advise students, respond to emails and phone calls and address faculty issues.

In reference to the normative, behavior and cultural-cognitive structures, the prescribed activities and behavior patterns for the Delivery Stage appeared to match closely enough that no further explanations were warranted.

(The time frame for the implementation process can range from one day to two weeks.)

Subunits

Evaluation

Evaluation, the newest subunit continues to develop and define its role within World Campus. Evaluation is a small subunit comprised of three employees, of which no one is dedicated 100% to evaluation duties. Two employees from Program Planning and Management allocate sixty percent of their time to assessment and one graduate assistant complete the subunit. Evaluation compiles data on student satisfaction surveys, perceptions about student services and devises reports as needed for World Campus leadership.

During the formative stages of the World Campus' development, the Sloan Foundation required an evaluative component in its award to Penn State. The University's Center for the Study of Higher Education conducted the initial assessments and upon the conclusion of the grant, assessments waned. The current goals for this subunit are to establish more definitive priorities for the World Campus and to identify the objectives of each World Campus subunit, determining to what extent the subunit objectives aligns with World Campus core functions.

Data Management Services

Data Management Services (DMS) develops enterprise level software for World Campus' administrative needs and applications. DMS maintains the World Campus' course-related website, selects and purchases all hardware and software, monitors time tracking applications and provides maintenance on systems and servers.

Chapter V

Discussion

The popular and scholarly literature on the developing use of the Internet for delivery of higher education paints disparate views of success and failure (Abel, 2005. p. iii).

Introduction

Despite the investment of several hundred million dollars in distance education, scores of DE organizations have permanently closed, failed to meet their objectives or undergone facets of restructuring (Carnevale, 2004; Arnone, 2002). Reasons for these distressing developments are without consensus; however, some argue the significant troubles in distance education are attributed to flawed administrative structures and ineffective or outdated organizational processes (Able, 2005; Moore & Kearsley, 2005; Davis, 2004; Moore, 1994).

Curious as to why many DE organizations were susceptible to failure, I explored a successful distance education organization. Using a framework guided by three elements of social structure – normative structure, behavior structure and cultural-cognitive structure, I examined processes, procedures, interactions and other factors collectively representing the internal core of the Penn State World Campus. By examining social structure and understanding how it relates to the completeness of the organization (people, technology, environment, goals) methods to improve organizations are immediately applicable and effective. Before the study was complete, I became aware of methods to resolve intradepartmental conflict and improve coordination practices. More importantly, I discovered why they existed.

Throughout the study I was hoping to uncover the great new ‘it’ that would revolutionize DE organizations or in some way help them to improve their ways of organizing. While the ‘shiny black box’ or new ‘it’ I was seeking to find may or may not have exposed itself; I did find

that an investigation on social structure exposes our human nature to inherently conform, say the right thing or to be politically correct. It's almost without conscious that we speak and think in terms of normative structures but find difficulty when asked to make the normative and behavior structures align.

Findings for this study in part suggest DE organizations are no different from other organizations. The same characteristics contributing to the success of banks, hospitals and car dealerships are the same good principles and practice that can be applied to DE organizations. While the findings revealed the World Campus' success is attributed to many factors, I identify five key factors and relate them to distance education practice and literature. To present the discussion, this chapter is organized beginning with the key findings, which serves as the response to the third research question: *How does the social structure of the Penn State World Campus affect its overall operations?* Following the findings, I offer lessons learned in this discovery process, touching on one potential concern for Penn State and the World Campus, and conclude with an area of practice that warrants further examination and research.

Five Key Factors Affecting PSU World Campus Operations

1. Efficiencies and effectiveness are achieved through departmental specialization. As a result, the program development process (core business) becomes flexible and adaptable, ensuring a continuous and reliable input/output cycle for the organization.
2. Supportive and effective University leadership coupled with strategic attempts to integrate distance education throughout the University demonstrates a commitment to the organization, which significantly increases sustainability.
3. Many World Campus job functions are organized around processes as opposed to specific tasks, resulting in flattened hierarchies and improved performances. Resembles features of the *Horizontal Organization*.
4. Strong fiscal accountability allows the organization to make decisions based on likely expectations as opposed to uncharted assumptions.

5. A full-service distance education: Not only providing service - online access to the book store, library services and student affairs, but receives services and support from auxiliary units.

Success Factor Number 1

Efficiencies and effectiveness are achieved through departmental specialization. As a result, the program development process (core business) becomes flexible and adaptable, ensuring a continuous and reliable input/output cycle for the organization.

The World Campus program development process receives substantial contribution from at least five subunits: Program Planning and Management, Instructional Design and Development, Student Services, Data Management and Business and Finance. The creation and separation of these subunits by function at times creates turf wars, but mostly, this functional structure (Hatch, 199) fosters departmental specialization, affording each subunit the ability to achieve higher levels of expertise by working in a more narrowly defined subject area. At first glance one might envision or expect a streamlined program development process, one in which each subunit offers quick turnaround times, promoting efficiency and therefore justifying the successful development process.

However, accomplishing an efficient process does not guarantee the process is effective. Efficiency and effectiveness are often used and misused to describe and analyze organizations and processes. To say the World Campus program development process is efficient is only referencing an internal standard of organizational performance. An efficient process simply measures how well the stated objectives are accomplished given the context of its resources. Higher efficiency is great, but it only describes the extent to which resources are utilized.

Effectiveness however, takes accountability for what is being measured or produced. Where efficiency is an internal standard, effectiveness is an external standard applied to measure an outcome or output. Organizations and processes can be efficient, but not effective; neither

efficient or effective and so forth. For example, in the not so distant past, diploma mills were extremely efficient organizations. They were capable of developing entire graduate programs in a matter of days. But to consider them effective would depend on what was measured. If learning was the output, then probably not, however, if revenue was the output being measured, then undoubtedly, they were efficient and effective, which raises another point.

Assuming most diploma mills have since faded reminds us the goal for organizations still remains to survive. The World Campus survives because of numerous factors, some will be discussed in the next heading, but the development process for new programs - the core of what the World Campus exists to do, significantly and positively affect World Campus operations. The adaptable and flexible nature of the development process promotes a continuous cycle of inputs and outputs.

For example, the business of online education can be simplified or explained by the following three questions.

1. Does your organization have quality educational products?
2. Are learners aware of these products?
3. Can you connect the two and repeat the process?

The World Campus excels in each of these three categories. In regard to quality products, the World Campus maintains a portfolio of more than 150 courses in close to thirty certificate and degree programs. Developing these products remains a team effort (discussed later), but the lion's share goes to Instructional Design and Development. This development unit is in essence a full-service content creation laboratory. In addition to creating courses, their capabilities extend through training needs, faculty development and instructional pedagogy. Designating this subunit the responsibility of working with faculty to develop content provides certain advantages for the

World Campus. These advantages point to references of efficiency: They have experienced personnel, which lead to speedier development cycles for products, which result from creating courses from modules, which leads to economies of scale, and the cycle continues. As a practical example of efficiency, the World Campus is capable of creating and developing a course more quickly than it could receive the approval to offer the course.

The marketing division responds well to the second question: Are learners aware of these quality products? The ability to deliver courses and programs over the Internet is not incredibly difficult. Actually, most academic units and faculty members possess the skill and technology necessary to deliver web-based education. However, delivering online programs remains one small aspect of online education. Where faculty members and academic units are most deficient and where the World Campus excels is in its ability to identify markets, connect information with learners, promote programs and actually secure the conversion from Joe individual to Penn State student.

The overall effectiveness of the marketing division clearly distinguishes the World Campus from individual faculty or department courses. For example, the ability to promote a program and enroll students helps balance the occasionally arduous and dependent relationship between the academic units and World Campus. Recall, the World Campus must partner with an academic unit to offer courses and because of this ‘need’, some academic units infer they are in a position to negotiate for increased revenues. While the World Campus does not have academic authority, its leverage is its effective command of marketing, which can provide services beyond the scope any Penn State faculty member or academic unit. Even today, marketing practices are in effect, transitioning from the name World Campus to reflect the brand name of Penn State Online.

The last question asks: can you connect the product with the learner and continue this process? To do so, is not the same as asking, do you have courses and are learners aware of them, it implies confirmation in terms of producing an enrollment and continues to infer the ability to consistently repeat the process over a sustained period. Each subunit within the World Campus plays a vital role and collectively the organization has demonstrated it can sustain itself with over 6,000 learners and six years of operation. The secret so to speak is in the design. The subunits are grouped according to function promoting expertise, but the development process operates as one team collectively assembled with the skills to complete the task and resolve conflict. The process is both efficient and effective.

Success Factor Number 2

Supportive and effective University leadership coupled with strategic attempts to integrate distance education throughout the University demonstrates a commitment to the organization, which significantly increases sustainability.

This study examined the social structure of a distance education organization seeking to uncover what contributes to its success. In many ways I was trying to unearth, what differentiates the World Campus from less effective DE organizations? We know many of the qualities and characteristics represented in successful DE organizations, but if we know them, why is it difficult to apply them?

The most consistent response regarding World Campus success referenced the support and vision of the President. Institutional support, as it is called in the DE literature, remains a frequently cited benchmark for success in dual-mode DE organizations (Meyer, 2002). There are a number of comments reflecting these claims for Penn State. An informant recalls an earlier conversation he had with the President; it speaks to the origin of the World Campus; he describes their exchange as follows:

It wasn't until [the President] came did we start to move on the World Campus, he said,

President: What have you folks been doing in distance education, come on down, let's talk about that. Where are we?

Informant: Our approach right now has been incrementalizing the growth risk.

President: Every opportunity that you have, seize it, move ahead.

Informant: But it's not an institutional priority and commitment. What we're trying to do is continue to take what we can.

President: Well, I don't think that's the way to do this. Not everybody should be in this business, but if we should... we really ought to make a major commitment to it and do it aggressively. Why don't you guys go kind of put a vision paper together and come on back and let me see it and we'll go from there. Let me see what you're thinking.

Informant: That would be great, (and this was the middle of June) we'll be happy to do that; we'll give you something by the middle of August.

President: Not August, no, no, I was thinking about something in two weeks.

Support at the institutional level is similar to strategic planning (Boettcher, 2004). And to plan for distance education requires leadership who recognizes that the institution, the DE organization and the core competencies must coincide (Boettcher, 2004). Another informant responding to what contributes to the success of World Campus states:

We have benefited from a very consistent leadership vision that began in the early 90s, really became articulated around 1995, 1996, and has stayed with us ever since. There has been a consistent vision about how we fit into the larger university and why it was important to engage adult learners at a distance. And again, you cannot overestimate the value of leadership and vision. That goes to [the President] ...and it really goes to the whole team that's grown up now over the last six, eight years, living with this stuff and understanding it better. But the

top leadership has been very important to the success of this, it cannot be overestimated.

Another informant states:

I think our success has been the fact that, we had support at the top, from [the President]. He did it exactly right, the steering committee report, you know, the whole nine yards ..., it was proposed, should we go for profit, should we be a separate subsidiary, and he said, no, that's not what I was going to do. And I think that has served us well.

Success Factor Number 3

Many World Campus job functions are organized around processes as opposed to specific tasks, resulting in flattened hierarchies and improved performances. Resembles features of the *Horizontal Organization*..

The organizational chart of the World Campus resembles many bureaucratic organizations. There exist clear hierarchies with divisions of labor and various reporting structures. On paper, the organizational chart depicts groups of people or divisions separated by job function, all performing similar tasks. While that structure is fairly accurate, it does not illustrate *how* the business of World Campus is achieved.

Instead of a classical organizational design with taller, thinner hierarchies, the World Campus surprisingly operates with a shorter more flattened hierarchy. The program development process provides an excellent example of this design. Instead of a process that would wait until one subunit completed its tasks before it handed it to the next subunit, the program team, an assortment of individuals from World Campus subunits, collectively works together to complete all the tasks necessary for program delivery.

The essence of this process resembles a new way of structuring work in organizations. It favors the horizontal organization. The fundamental concept of the horizontal organization is to

arrange autonomous work teams to perform many different steps in a process. Basically, organizations are structured around processes instead of tasks. Explaining the principles of the horizontal organization, Hammer states, “Positions will not be defined in terms of collections of people, like head of the sales department, but in terms of processes, like senior VP of getting stuff to customers, which is sales, shipping and billing. You’ll no longer have a box on an organization chart. You’ll own part of a process map” (Hammer, 2000 in Greenberg 2005, p. 562). A perceived advantage of the horizontal organization is a smaller work force and the ability to condense the organization down to its most fundamental processes and then, organize around those processes.

Success Factor Number 4

Strong fiscal accountability allows the organization to make decisions based on likely expectations as opposed to uncharted assumptions.

Success for the World Campus derives from its astute understanding of its costs. Rarely do DE organizations have opportunities to experience (for lack of a better phrase) such impressive financial estimation skills. This fiscal accountability affords the organization the luxury of making critical decisions and long-term commitments based on likely expectations versus unfounded assumptions. Established and imbedded throughout the organization, the term cost recovery and expenditures are not buzzwords and are closely monitored. Business and Finance has implemented procedures and systems that determine how much courses cost to develop, how long it takes to develop them, how many man hours are required from each position for development and the likely return on their investments.

Another display of fiscal accountability is demonstrated by World Campus’ revenue-sharing model. The revenue-sharing model allocates ‘flexibility’ by allocating different

percentages of fees back to the academic unit in accordance to the level of their commitment. For example, if the World Campus is responsible for all costs, including development and faculty salary, then the academic unit will share a smaller percentage of the return. The insert below provides an indication how revenue is divided.

The academic unit receives 10% of gross revenue, and World Campus receives 90% of gross revenue, with gross revenue defined as the actual tuition income for the program. Total enrollments in the program are anticipated to be ___ in 2005-06 and ___ in 2006-07. If these enrollments materialize the share of gross revenue for the academic unit is estimated to be \$_____ for 2005-06 and \$_____ for 2006-07 under Gross Revenue Sharing Level One. (There are a total of four Gross Revenue sharing levels.)

Success Factor Number 5

A full-service distance education: Not only providing service such as online access to the bookstore, library services and student affairs, but receiving services and support from auxiliary units.

It is often said that great people make great organizations. Holding to that concept, part of the World Campus success stems from its ties to great organizations such as Continuing Education and more recently, Penn State Outreach. The expanding competition for the adult education market requires DE organizations to provide the necessary services to meet the demands of these largely, part-time students with busy schedules.

Accordingly, ample services coupled with convenience are amenities sure to welcome most learners. DE organizations today are unlikely to remain competitive without a full range of services that provide students online access to the bookstore, registration process, library, advising and so forth. But what distinguishes the World Campus for other DE organization is its commitment to actively and continuously seeking new customers through auxiliary services.

Client Development is an auxiliary unit for Penn State Outreach that services World Campus. This unit cultivates additional opportunities for World Campus. Instead of relying on

individual student enrollments, like many DE organizations, Client Development partners with the corporate and military sector to deliver services and to develop new income streams for the World Campus. For example, an informant describes the nature of these relationships:

We manage a contract with the Army called E-Army-U, which is a major on-line initiative... IBM is the prime contractor on that, and we are a subcontractor. This particular contract is a five-year contract, I think it was \$243 million dollars...

Lessons Learned

Penn State's leadership regularly receives credit for integrating and mainstreaming distance education into the fabric of the University. Resisting the temptation to form a separate stand-alone DE unit and denying pressure from venture capitalist to design a for-profit model, the University opted for a more modest approach to deliver distance education. Penn State's vision for DE anticipated a centralized unit serving as the delivery instrument for all University programs.

As Penn State's delivery instrument, World Campus has outlasted similar organizations possessing more resources in part because of its organizational model. This not-for-profit, cost recovery delivery unit hires the same faculty, provides student services, awards the same credentials and is governed by the same academic council as its dual-mode counterpart. However, the strengths of Penn State World Campus may eventually weaken Penn State in other capacities.

Penn State's most rivaled competitor is Penn State. The University operates twenty-four campus locations across the state varying in scope and size from less than a thousand students to more than forty thousand students. While the World Campus is not necessarily a campus, its 6200 students rank it as one of the larger campuses, affording it a fair amount of organizational

clout. The problem is not the size of World Campus, but rather how this model affects other campus locations.

World Campus is the only Penn State “campus” whose services completely overlap every campus. The Penn State model not only allows, but encourages World Campus to deliver certificates, courses and degree programs at each campus location, often at a reduced tuition rate. This concept provides convenience for students but creates tension at smaller campuses. In this model, competition for Penn State students by Penn State is unavoidable.

This ‘World Campus Effect’ is much more profound for smaller campuses like Penn State McKeesport with 800 students than at larger locations like University Park with 40,000 enrollments. For example, at University Park, if student enrollments are marginally reduced in the College of Education because nine students select World Campus courses, the sheer size of the college is able to sustain (FTE) fluctuations. Conversely, if a handful of resident students at McKeesport enroll in courses through World Campus; their absence may result in the loss of a faculty member and, at minimum, create a severe budget crisis. The original design intentions of the World Campus were to support Penn State colleges and their respective academic units and it has, and while the full consequence of World Campus’ success has not yet materialized, a Penn State model breeding competition against itself will eventually require modification.

An expectation of Penn State is to integrate the World Campus into the University system so less distinction exists in terms of how students take courses - a goal attempting to blur the line between resident instruction and distance education. Commonly, we utter “A Penn State degree is a Penn State degree,” referencing a universal standard of quality. While no distinction is made by which campus or how the degree was earned, there exists an obvious distinction in the way the university processes learners.

The Penn State World Campus model features flexibility for students through multiple methods of course delivery at multiple campuses. A drawback of this model and common complaint by students is that fees and tuition rates are often complicated and dependent upon the students' status. For example, a full-time student registered at University Park can select up to sixteen credits and pay the regular in-state or out-of-state tuition. If that same student wishes to take one or more courses through World Campus, the student's tuition rate does not cover those costs. An additional per credit fee is applied to any World Campus course.

Some students crave a four-year campus experience while others want to earn degrees completely online. Some students want to be introduced to college courses while in high school and others expect continuous education. Penn State accommodates these requests but the current model produces confusion for students in respect to their University affiliation (home campus) and student status (non-matriculating, part-time, full-time, continuing education, or specialty). It is quite possible for students to have representation from multiple campuses with more than one student status, but to discern the costs in this situation in many instances requires University assistance.

Again, integration for World Campus into the University is desired but tuition, fees and registration for World Campus courses and programs are performed independently and separately with varying fee structures from other campuses. The tuition disparity based on students' 'campus' designation can penalize and restrict Penn State students from Penn State services. This practice seems inconsistent with the message that regardless of the twenty-four campus locations, Penn State is Penn State.

Personal Insights

I embarked upon this study looking to uncover how the World Campus operated. I realized that processes and internal interaction are always interconnected and depended on larger forces internal and external to the World Campus. As I became more embedded with the operation of the organization, I began looking beyond visible subunits and the sequence of activities to find how decisions or individual actions and relationships affect the entire organization.

For example, the Penn State World Campus model assigns academic authority to the Deans of each respective college, the same model as resident instruction. With this one decision the World Campus is also bound to the Graduate School and all of its associated authority, rules and policies. The Graduate School enacts policies restricting the student-teacher ratio and prevents graduate students from teaching 500 level courses. These restrictions infer that an online graduate course can reach capacity with a fairly small number of students. The advantages of distance education are achieved through economies of scale and now, a potential problem exists.

Without an understanding of organizations, I may have only discovered elements of how the World Campus operates - missing the rich salient pieces as to why it operates as it does or not uncovering under what circumstances might influence its operation. Organizational theory exposes cause and effect scenarios from decision-making and helps to identify and forecast what and where potential obstacle might reside.

Areas for Further Research

Areas for further research are needed in financial forecasting and revenue models for dual-mode DE organizations. Considerable knowledge is needed in respect to realistic

expectations regarding the following: What are the costs required to sustain a DE organization? Where and how can new revenue be generated? Where is revenue generally wasted? The answer to these types of questions may further advance the field and reduce the recurrence of failing DE organizations.

CHAPTER VI

Distance Education 2021

There was a time not long ago when we would say, ‘I’m on a long-distance call,’ distinguishing the prominence of distance from a local call. Today, it’s just a call – let’s catch up distance education.

Anthony Williams

Distance Education

Distance education (DE), has evolved from sporadic correspondence courses like shorthand, delivered by the U.S. Postal service, to 4D virtual classrooms and degree programs available on cellphones (Debter, 2014). Distance education’s generational transformation from correspondence courses to teleconferencing, multi-media and online delivery arguably offers students greater flexibility, convenience, and access to higher education. The growth and success of distance education has not only diminished previous questions about its effectiveness in higher education but changed the narrative: colleges and universities are now expected to provide it.

About 1996, as institutions discovered ways to take advantage of emerging and less expensive technology, more colleges and universities expanded their online curricula and provided broader delivery mechanisms. As a result, distance education enrollments increased, teaching and learning improved, and substantive research provided validity for the field. Distance education has undoubtedly transformed into a mainstay within higher education, but like traditional face-to-face instruction, challenges remain. However, the challenges of DE today are quite different from those presented in the previous chapters. This chapter seeks to bridge the gap from my original 2005 study by revisiting and exploring distance education in 2020. This examination of DE will provide its current demographics, statistics, and progressions and identify the most prominent research interests published since 2005. This updated chapter also

discusses distance education's most urgent challenges, such as COVID-19, and offers recommendations for practice, institutional DE policy and highlights areas for additional research.

2020 Facts and Statistics

The National Center for Education Statistics projects that 19.6 million American students – 12 million full-time students and 7.6 million part-time students – will attend college in 2020-21 (“2018 Annual Report”, 2019). Distance learners represent 7 million students, which accounts for 35% of all college enrollment and roughly 90% of all part-time enrollment (NCES, 2019). Online Nation (2006), reported 3.5 million students were enrolled in online courses in 2006, however, today's 7 million distance learners suggests that students are migrating heavily into distance education (Venable, 2018).

The influx of DE learners is best evidenced by enrollment figures. Since 2004, distance education enrollments have increased for sixteen consecutive years, while traditional education enrollments experienced continued decline between 2012 - 2018 (Hill, 2020). During the seven-year span from 2012 - 2018 traditional education enrollments decreased by one million students, as distance education enrollments increased by one million (Hill, 2020). Similarly, in 2003, only 16% of American undergraduates enrolled in distance education courses. However, by 2018 DE enrollments had increased by more than 118% (“25 Surprising or Little Known Facts,” 2020). While DE's enrollment increase has been substantial, contextual considerations must be applied. Data representing the distance learner generally defined a distance learner as a student who took at least one course online, which is distinctly different from exclusive online enrollment.

In addition to enrollment figures, student demographics and fields of study have also transformed (Venable, 2018). Students participating in distance education have become

increasingly younger. While the adult learner (aged 30 and older) has remained distance education's largest age group, the younger age group (ages 15 to 23) has seen participation spikes. In 2019, 41% of all distance education participants were categorized as adult learners, 35.5% were between ages 24 and 29, and 24.5% were between ages 15 and 23 ("25 Surprising or Little Known Facts," 2020).

Race and ethnicity are also examples of growth, change and progress in distance education since 2005. "The Online Education Trends Report" (2020) asserts that administrators have seen more diversity in student enrollments across ethnic groups. Over the past 15 years, race and ethnicity perhaps yielded the most intriguing statistics in distance education because an analysis of the distance learner reveals data many may initially question. The National Center for Education Statistics identified the Black graduate student as one of the largest groups participating in distance education ("25 Surprising or Little Known Facts," 2020).

Research indicated that 49% of Black graduate students enroll in distance learning followed by 36.9% of White graduate students ("25 Surprising or Little Known Facts," 2020). This is interesting in the context of the US population. Of the roughly 330 million residents, 76% are White and 13.4% are Black. Furthermore, 20 million students are projected to enroll in the 2020-21 academic year and only a fraction will be Black students – undergraduate and graduate combined. Although research has not specifically indicated why Black graduate student's participation rates in DE are high, it may be attributed to the online vs. on campus debate (Venable, 2018). The reasons Black graduate students have selected online enrollment over residential instruction are likely the same as other students that choose online instruction: convenience, flexibility, limited options and employer incentives (Venable, 2018). Table 6.1 identities additional enrollment percentages according to race and ethnicity. It is relevant to note

Native Americans accounted for the highest participation percentage of graduate students in distance education at 55%, but they also accounted for the absolute lowest total enrollment, which may explain their high participation percentages. It is possible the same scenario is applicable to Black graduate students' high participation percentages.

Data revealed significant variance among graduate and undergraduate participation rates. The undergraduate distance learner participation percentages were more closely aligned regardless of race and ethnicity. Table 6.1 illustrates the undergraduate participating percentage rates among each group. 33% of White undergraduates participated in distance education followed closely by Blacks at 32.7%. Essentially, White and Black DE undergraduate students' participation rates are statistically equivalent. In comparison, Asian students make up the lowest participation percentage, trailing at 26.9%, but the difference between the highest and lowest rate is a nominal difference of just seven percentage points. Recall, the gap at the graduate levels exceeds 35 percentage points.

Table 6.1

Participation Rates in DE by Race and Ethnicity

White	Black	Hispanic	Asian	Pacific Islander	Native American	Two Races+
<i>Undergrad</i> 33%	32.7%	27.9 %	26.9%	29.9%	32.6%	30.6%
<i>Graduate</i> 36.9%	48.8%	34.6%	19.4%	44.4%	55.1%	40.4%

Note. "25 Surprising or Little Known Facts," 2020.

Most fields would find it reasonable to expect considerable change, growth and progress over a fifteen-year span, and distance education is not an exception. DE enrollments have more than doubled, technology has continued to transform, availability has become common, and

participation has become much more inclusive. However, the fields of study have not fluctuated much since 2005.

The top five graduate and undergraduate fields of study for online students are represented in table 6.2 and 6.3. Computer science is the top selection for undergraduate distance learners, followed by business and management, education, health and social sciences (NCES, 2019).

Table 6.2

Undergraduate Distance Learner Fields of Study

<u>Computer Science</u>	<u>Business & Mgmt.</u>	<u>Education</u>	<u>Health</u>	<u>Social Sciences</u>
41%	39%	34%	33%	32%

Note. “Digest of Education Statistics,” 2019.

Table 6.3

Graduate Distance Learner Fields of Study

<u>Education</u>	<u>Business & Mgmt.</u>	<u>Social Sciences</u>	<u>Health</u>	<u>Humanities</u>
49%	41%	37%	37%	28%

Note. “Digest of Education Statistics,” 2019.

Although the top academic fields of study in distance education experienced minimal changes, the National Center of Education Statistics reported the same is true for all higher education (“2018 Annual Report,” 2019). From 1970 to 2018, the leading bachelor’s degrees conferred by field of study remained constant. The top fields of study were business, health, social science, biological/biomedical sciences and public administration/social sciences (“2018 annual report,” 2019).

Institutional Data

The Babson Research Group reported that almost half of all distance education students are enrolled at just 5% of all institutions (Seaman et al, 2018). Further, “a mere 10 institutions account for over 10% of all distance education enrollments yet represent only 0.21% of higher education institutions” (Seaman et al, 2018, p. 22). Why? There are seven million distance learning students. Do they all enroll at the same few institutions? Considering the NCES recognizes 6,502 postsecondary Title IV institutions and 4,313 of these are degree-granting, public, private, nonprofit and/or for-profit schools, then yes, distance learners enroll at the same few institutions. Table 6.4, created by the Babson Research Group, highlights the relationship between the number of institutions and their percentage of distance education enrollments taking at least one DE course.

Table 6.4

Institutions and DE Enrollment/ Percentages 2016

Number of DE Institutions	Percentage of All Institutions	Distance Enrollments	Percentage of Distance Enrollments
10	0.21%	649,023	10.2%
13	1.0%	1,421,703	22.4%
63	5.0%	2,985,347	46.9%
471	10.0%	4,025,099	63.3%

Note. Seaman et al, 2018

In 2016, the top ten distance education institutions by enrollment (taking at least one distance course) were all private with one exception, the University of Maryland-University College. The University of Phoenix-Arizona had the largest enrollment at approximately 130 thousand students followed by Western Governors University (84k), Grand Canyon University

(68.5k), Liberty University (67.7k) and Southern New Hampshire University (63.9k). The University of Texas at Arlington (21.3k) ranked 25th, The Pennsylvania State University-World Campus (13.4k) ranked 43rd, and California State University-Fullerton (12.7k) was 50th (Seaman et al, 2018).

In 2018, Western Governors University claimed the largest enrollment with 121,000 students, a 72% increase from 2015, while the University of Phoenix-Arizona experienced a 41% decline, dropping them to third with 95,000 students (Lederman, 2018). Online enrollments fluctuate as some institutions may invest heavily into DE and others might see declines as they transition from for-profit to nonprofit status. For example, between 2015 and 2018, roughly 75% of the top 50 DE institutions experienced increased enrollments, but the University of Phoenix and roughly 25% of the same top 50 DE institutions had declining enrollments (Seaman et al, 2018).

Overall, enrollments among institutions offering DE have shown positive gains. Colorado Technical University-Colorado Springs for instance experienced a 2,780% increase in enrollment, from 900 students in 2015 to 26,000 in 2018. Several institutions achieved 20%, 30%, or even 60% increases in enrollment. It is widely accepted that distance education is on the rise (Magda, 2020; Lederman, 2018; “The Integrated Postsecondary Data System,” 2020), but knowing the type of institution (public, private, nonprofit, or for-profit) and where these students take DE courses provides insightful information. Table 6.5 illustrates the top 50 DE institutions along with enrollment figures from 2015 - 2018.

Table 6.5*Top 50 DE Institutions and Enrollments*

Institutions	All Enrolled Students, 2018	Students Enrolled Entirely online, 2018	Enrolled in Some but Not All Online Courses	Total Online Enrollment (2018)	Total Online Enrollment (2017)	% Increase, 2017 to 2018	Total Online Enrollment (2015)	% Increase, 2015 to 2018
Western Governors University	121,437	121,437		121,437	98,627	23.10%	70,504	72.20%
Southern New Hampshire University	104,068	96,912	500	97,412	84,550	15.20%	56,371	72.80%
University of Phoenix-Arizona	95,777	94,472	342	64,814	102,495	-7.50%	162,003	-41.50%
Grand Canyon University	90,253	70,295	10,704	80,999	75,154	7.80%	54,543	48.50%
Liberty University	79,152	64,006	7,106	71,112	67,312	5.60%	72,519	-1.90%
University of Maryland-University College	60,603	48,432	5,996	54,428	53,080	2.50%	48,677	11.80%
Walden University	50,360	50,360		50,360	49,680	1.40%	52,799	-4.60%
American Public University System	46,088	46,088		46,088	46,420	-0.70%	52,361	-12.00%
University of Central Florida	68,475	10,269	29,001	39,270	38,073	3.10%	33,034	18.90%
Ivy Tech Community College	72,006	15,010	23,627	38,637	36,640	5.50%	34,103	13.30%
Florida International University	57,942	11,785	25,978	37,763	34,281	10.20%	26,341	43.40%
Arizona State University-SkySong	38,540	37,000	305	37,305	30,422	22.60%	19,094	95.40%
Capella University	37,171	37,171		37,171	36,284	2.40%	34,365	8.20%
Ashford University	34,710	34,705	5	34,710	36,452	-4.80%	42,046	-17.40%
Brigham Young University-Idaho	42,341	21,053	11,395	32,448	42,057	-22.80%	33,551	-3.30%
Purdue University Global Davenport	30,512	30,512	0	30,512	33,287	-8.30%	45,268	-32.60%
Excelsior College	30,008	30,008		30,008	34,022	-11.80%	43,123	-30.40%
Lone Star College System	73,499	11,524	17,317	28,841	29,340	-1.75	21,811	32.20%
Chamberlain University-Illinois	27,629	25,033	1,317	26,350	25,757	2.30%	22,114	19.20%
University of Florida	52,218	4,766	21,513	26,279	30,795	-14.75	28,838	-8.90%
Colorado Technical University-Colorado Springs	26,184	25,038	886	25,924	25,093	3.30%	900	2780.40%
The University of Texas at Arlington	47,899	18,425	6,439	24,864	23,362	6.40%	17,541	41.70%
Arizona State University-Tempe	51,585	268	23,569	23,837	23,723	0.50%	22,809	4.50%
University of South Florida- Main Campus	43,846	5,468	18,317	23,785	22,876	4.00%	20,993	13.30%
Houston Community College	57,200	8,384	13,186	21,570	20,344	6.00%	19,111	12.90%
Columbia Southern University	21,104	21,104		21,104	20,818	1.40%	20,823	1.30%
California State University-Northridge	40,212	1,304	19,451	20,755	20,127	3.10%	16,130	28.70%
Ohio State University-Main Campus	61,170	2,284	18,037	20,321	16,439	23.60%	11,747	73.00%
Valencia College	46,521	7,987	12,318	20,305	18,746	8.30%	17,216	17.90%
Full Sail University	20,170	14,554	5,168	19,722	18,212	8.30%	19,939	-1.10%
Texas Tech University	38,209	3,513	15,508	19,021	17,369	9.50%	14826	28.30%
University of Houston	46,324	1,646	16,613	18,259	16,558	10.30%	12,961	40.90%
University of North Texas	38,241	3,902	13,820	17,722	15,821	12.00%	12,517	41.60%
University of Illinois at Urbana-Champaign	49,702	4,767	12,503	17,270	14,551	18.70%	10,720	61.10%
Florida State University	41,005	2,738	14,515	17,253	16,355	5.50%	12,858	34.20%
University of Arizona	44,097	4,242	12,701	16,943	15,443	9.70%	9,660	75.40%
St. Petersburg College	29,183	10,068	6,814	16,882	16,409	2.90%	16,501	2.30%
University of Cincinnati-Main Campus	37,886	6,280	10,520	16,800	15,358	9.40%	13,992	20.10%
Devry University-Illinois	17,364	15,837	941	16,778	16,119	4.10%	20,458	-18.00%
San Diego State University	35,303	646	15,788	16,434	14,170	16.00%	9,634	70.60%
College of Southern Nevada	34,169	6,621	9,291	15,912	15,368	3.50%	14,906	6.70%
University of Iowa	31,656	3,022	12,073	15,095	9,363	61.20%	12,784	18.10%
Kent State University at Kent	28,122	3,953	11,117	15,070	14,235	5.90%	13,754	9.60%
Kennesaw State University	35,420	3,899	11,083	14,982	14,204	5.50%	10,056	49.00%
The University of Alabama	38,390	3,786	11,148	14,934	11,697	27.70%	9,658	54.60%
University of Minnesota-Twin Cities	50,734	1,095	13,571	14,666	13,689	7.10%	10,037	46.10%
North Carolina State University at Raleigh	35,479	2,986	11,555	14,541	14,199	2.40%	12,321	18.00%
Pennsylvania State University-World Campus	14,458	14,458		14,458	14,301	1.10%	12,242	18.10%
The University of Texas Rio Grande Valley	28,644	2,434	11,935	14,369	12,741	12.80%	9,914	44.90%
California State University-Fullerton	40,280	2,161	12,133	14,294	13,957	2.40%	11,148	28.20%

Note. Lederman, 2019. Integrated Postsecondary Education Data System, National Center for Education Statistics

Distance Education Evolution 2005-2020

In 2005, distance education was perceived quite differently than it is today (Kentnor, 2015). Fifteen years ago, DE's connotation was one of usefulness but uncertainty. Consistent concerns emerged about the future of distance education, including a lack of faculty buy-in, escalating costs, ineffective policies and questionable organizational structures (Cavanaugh, 2004; Howard & Schenk, 2004; Porter, 2004; Zemsky & Massy, 2004). As a result, 'Failure', 'Closing' and 'Restructuring' became the repetitive headlines in distance education news. Consequently, scores of DE organizations restructured their initiatives, changed their mission or completely went out of business (Wilner & Lee, 2002).

In the introductory chapter, I established that during the early 2000s, the questions "what works" and "how do you structure, manage and model distance education" dominated the field. "It depends" was the ineffective response. Fifteen years later, the questions are no longer the same, as the field has progressed from an educational novelty, but still faces new challenges such as COVID-19.

Distance education's transition from uncertainty and failures to sustainability was not the product of extraordinary technological advancement or an influx of capital. Instead, the transition emerged from a commitment to fundamentally grounded distance education principles. These principles have been established following decades of research and analysis as to what leads to success in some DE programs and not others. They are: effective digital pedagogy, student engagement, student learning and instructional design (Zawacki-Richter, 2016; Orellana & Nethi, 2019.) The point here is to understand what has contributed to DE's recent evolution.

While there is ample research on the proliferation of distance education or individual topics related to DE's origin, generational transformation and technology advances, these topics

appeared too singular or limited in scope. Certainly, while all these specific topics are capable of chronicling DE's journey, I selected a more inclusive method to analyze distance education's transition and growth.

I combed distance education literature between 2005 and 2020 seeking to identify major research topics, specifically choosing articles, studies, and research reports that synthesized topics by themes and timelines. Within this literature, I then selected titles with key phrases related to research trends in DE, DE's 30-year evolution, mapping major concepts and journal reviews. The goal was to allow the research to shed light upon my questions: What has changed in distance education since 2005, how has the field progressed and what have we learned?

Orellana and Nethi's study (2019) in the *Quarterly Review of Distance Education* identified key DE trends from 2002-2017. The authors categorized their findings according to the Zawacki-Richter (2009) classification framework of research in distance education. Their findings indicated that, during 2002-2017, more than half the articles published in the journal were related to teaching and learning. The teaching and learning grouping included other micro-level subject areas such as learner characteristics, interaction, communication and instructional design. Their findings are consistent with similar studies.

Zawacki-Richter and Naidu (2016) conducted a comparable study to Orellana and Nethi (2019), but the examination and data was collected from the *Distance Education* journal as opposed to the *Quarterly Review of Distance Education*. Zawacki-Richter and Naidu sought to identify and understand the most common DE themes and trends over a 35-year period from 1980-2014, split into five-year segments. I separated the research findings into three timeframes between the years 2000 and 2014: 2000- 2004, 2005-2009 and 2010-2014.

During the years 2000-2004, the leading research topic was overwhelmingly ‘learning,’ including themes related to education and instructional design. The second span, 2005-2009, focused on online education and varying instructional delivery modes. Zawacki-Richter (2016) reported that “People and organizations which had no background or experience in distance education are adopting and engaging with online education and mixing and matching modes” (pp. 258-259). There were several articles on student interaction and faculty support for large scale DE applications. The third span, 2010-2014 reveals more of the same research topics. Interaction among students and between teachers as well as students’ learning preferences with technology were among the leading research themes, trends and articles.

Although internet-based distance education is young, the literature is replete with comprehensive data analyzing research on its most published areas of study. Some of the most recognized studies include: “Trends in Distance Education Research” (Bozkurt, et. al, 2015), “Review of Research in Distance Education” (Berge, 2001) and “A Review of Trends in Distance Education Scholarship at Research Universities” (Davies, 2010). However, I found *The International Review of Research in Open and Distributed Learning* the most significant journal contributor for this metaanalyses of distance education.

In 2019, the journal published “An Analysis of the Journey of Open and Distance Education: Major Concepts and Cutoff Points in Research Trends” (2019). The article identified major concepts and cutoff points in distance education from 2009 - 2016. Although the most published DE topics have been open educational resources and student perspectives, the authors suggested more research is needed in online teaching skills and the effect of DE on teachers.

The common theme among all these sources is an abundance of scholarly work on teaching and learning. Obviously, at the discretion of the writer, other research themes and trends

can be substituted to satisfy these same criteria. However, it would be difficult to dismiss the sheer volume of topics directly and indirect related to the broad theme of teaching and learning.

We can extrapolate quite clearly from the research that teaching, learning, and faculty training have been significant components impacting DE's growth, change and evolution (Bates, 2015; Tanis, 2020; Hansen, 2019; Cengal, 2015). Improvements in teacher/student interaction, instructional design, learning management systems and an overall upgrade in faculty have been primary factors in DE's recent success and a significant difference from its prior years.

However, in the earlier days of internet-based DE, faculty were not particularly interested, skilled or incentivized to participate in distance education (Bower, 2001). Around 2000, as the online classroom gained momentum in higher education, academia initially perceived distance education as a cash cow. In the words of many senior administrators, distance education was a vehicle by which to expand the university's reach while providing another substantial revenue stream. Too frequently, institutions made the decision to offer DE prematurely and mistakenly without the most critical component - faculty buy-in (Maguire, 2005).

The term 'faculty buy-in' is an all-encompassing phrase representing approval as well as the willing, qualified and well-trained individual. The absence of faculty buy-in was not enough to cause the closure and restructuring occurrences of the early 2000s, but faculty is undoubtedly one half of the success of teaching and learning. As such, their acceptance, concerns, approval, and commitments are acknowledged as a critical factor for successful and sustainable distance education programs (Dhillia, 2017). Abundant research ties faculty backed online courses and programs with higher levels of quality and learning (Smidt et al, 2017). Prior to the wide use of instructional design, it was not uncommon for faculty to upload their notes, outlines and course

objectives and consider that a web course. Resulting from such actions, learning outcomes suffered, students felt isolated, effective evaluation methods were intangible and student retention plummeted. Consequently, it became difficult for many distance education organizations to outlast ineffective teaching and learning.

Experience has taught us that faculty buy-in and university policies were usually misaligned, ultimately becoming a factor in those failing DE headlines from the 2000s. Today, those ominous articles and their captions and resistant faculty perceptions have changed. At present, an institution's ability and willingness to secure more faculty, establish or enhance their digital pedagogy, and properly incentivize faculty, positions distance education more favorably today than in its recent past.

Distance Education Challenges

Distance education challenges are widespread, wide-ranging and dauntingly uncategorizable without reference points or a framework. For instance, limited internet access and slow connectivity speeds are not high priority concerns in the United States, but they are urgent and paramount in Nigeria. To provide a more manageable means to segregate and discuss DE challenges, Zawacki-Richter's (2009) macro, meso and micro levels of analysis are applied.

Macro-level analysis is typically associated with broader entities or big picture categories like theory or entire distance education systems. The meso-level represents a smaller footprint than the macro-level and can be considered as the institutional level addressing management and organization issues in DE. The smallest level of analysis, the micro-level may address topics within the teaching and learning realm as an example. Although the vast collection of DE challenges is beyond the scope of this chapter, I present two pertinent and unavoidable issues in distance education - terminology and COVID-19 - both macro-level emergencies.

Terminology

As previously mentioned, a myriad of challenges exists in distance education today. Some challenges, such as the inability to authenticate online students' identity, are less consequential than others like diminishing revenues. There are also more troublesome problems that could potentially jeopardize the field or heighten its vulnerabilities, such as the absence of clear, cohesive distance education terminology. This is a serious issue that creates confusion in practice and asphyxiates clarity in publications.

It is disappointing and confusing when DE publications, practitioners, and scholars continuously struggle with terminology. The incorrect use of DE terminology within the field is globally acknowledged, long-standing and quite candidly, likely to continue. We can speculate with high levels of confidence what has attributed to DE's terminology debacle, but I am uncertain if anyone has been able to successfully articulate why the problem has existed for so long.

E-learning, online education, virtual learning, distance education, distance learning, open and distance learning, blended, mixed-mode and hybrid learning, information and communication technologies are all used somewhat interchangeably (and incorrectly) in the literature. The problem is not simply the inability to define terms accurately. It is also interchanging them improperly, along with conflicting meaning and word choice. For example, geographical distance is not a prerequisite for distance learning and the term 'virtual learning' is technically the antonym for 'actual learning'. Furthermore, according to the Pew Learning and Technology Program, distance education, distance learning and online learning are more or less interchangeable (Twigg, 2001). These terms are not synonymous (Diehl, 2013; Guri-Rosenblit & Gros, 2011).

The cause for these terminology mishaps is attributable in part to distance education's evolution and "conceptual confusion" (Diehl, 2013, p. 2). The development and infusion of technology in education created new jargon with elevated capabilities. It became problematic because newer terms often described the technology or its functionality without aligning the terms within the DE field of study. Bates (2008) offers an explanation for DE's inconsistent vocabulary usage, "We are trying to describe a very dynamic and fast changing phenomenon, and the terminology often struggles to keep up with the reality of what is happening."

Difficulty with DE terminology is further compounded when prominent scholars in the field cannot agree. For example, Bates (2008) believes e-learning occurs on campus and at a distance. Zemsky and Massy (2004) refer to e-learning as an innovation. Twigg (2004) disagreed with Zemsky and Massy, challenging their assumption by suggesting e-learning is also a distance learning program for students off campus. Moore (2007) asserts distance learning is not a program but rather an outcome of distance education. I am of the position that e-learning is electronic learning which is an adjective, not an academic discipline or an instructional pedagogy. The ambiguity of these terms, their roles and functions suggest the domain of e-learning is not a well-defined field of study and research (Guri-Rosenblit, 2011).

For over a decade the field has struggled to make any notable advances with terminology. "It does not seem possible at this stage to aggregate the multiple terms into one accepted term, to be used by all practitioners and researchers in this field" (Guri-Rosenblit, 2011 p. 8). Without clarity of meaning, the problem continues - interpretation is implied but not necessarily achieved. Inconsistency in DE terminology has proven to be frustrating and limits the ability to effectively improve practice or critically expand research in a rapidly developing field. How do we move forward to incorporate and adopt a more unified approach to DE terminology?

Distance education is global, yet it does not acknowledge a universal governing body. Perhaps the field should consider creating a global organization similar to the Quality Assurance Agency for Higher Education in the UK. According to the website, the agency

...aims to help higher education providers build a common language to describe digital approaches to program delivery ... It looks to define some of the most common terms that providers use to describe the ways in which they and their students engage with digital teaching and learning (QAA, 2020).

Distance education's role at institutions will continue to evolve and innovative technology will continue to afford DE participants additional access, delivery, and learning options in higher education, but until there is consistency in terminology, confusion and ambiguity will remain.

COVID-19

There is a more immediate and uncharted challenge facing not only higher education but human livelihood in the form of the pandemic Coronavirus 2019 (COVID-19). COVID-19 originates from a new virus called the Severe Acute Respirator Syndrome Coronavirus 2. First identified in China, the World Health Organization officially declared COVID-19 a global pandemic in March 2019.

COVID-19 is a disease. It's named corona because when it's viewed under a microscope, each of its virions, the external envelopes surrounding the virus' cells have a corona or crown-like shape (Chorba, 2020). COVID-19 is a respiratory ailment that is airborne and spreads rapidly and easily. Although COVID-19 is a rare, unique, novel disease, it is not unfamiliar. There is a well-documented global history of infectious diseases. The Spanish Influenza in 1918, the Asian Flu in 1957-58 and the Hong Kong Flu in 1968-70 caused

pandemics and brief economic downturns. However, COVID-19 is set apart as the most destructive pandemic in world history.

According to the *New York Times*, the United States has recorded the world's highest number of cases with a total of 11.1 million cases and at least 246,232 deaths as of Wednesday, November 18, 2020. The State of California leads the nation with 1,029,235 cases followed by Texas in second place with 1,027,889 cases. Florida, ranked third, has 877,340 cases, followed by New York with 567,519 cases and Georgia in fifth place with 426,236 cases. India, the nation with the second highest number of cases, has recorded 8.9 million cases. India recorded one million of its cases in eleven days. To date, there are over 36.9 million COVID-19 global cases with more than 1 million deaths and no vaccine ("Covid in the U.S.," 2020).

COVID-19 created a global disruption, wreaking havoc on virtually everything. As the virus spread, cities, states and countries instituted mandatory lockdowns and restricted employment to essential personnel only. Unemployment rose higher during a three-month period of the pandemic than during two years of the Great Recession from 2007-2009. At the height of the pandemic the unemployment rate soared to 14.7 percent. The United States Department of Labor reported that 20 million people abruptly lost their jobs.

In response to a decimated economy, the federal government issued stimulus checks when Congress passed the Coronavirus Aid Relief and Economic Security Act (CARES), a \$2.2 trillion economic bill. The US Department of Education also acted, providing six billion dollars for students via the Higher Education Emergency Relief Fund. While these actions certainly helped, the funding has not successfully combatted projections that 25% of all businesses could permanently close by the end of 2020. COVID-19 continues as a disruptive force as uncertainty guides many decisions. This indecision is particularly evident in higher education.

COVID-19 and Higher Education.

In February 2020, the unforeseen consequences resulting from COVID-19 on college campuses were speculative and worrisome. By March, reality demanded that higher education officials take urgent measures, such as suspending classes or temporarily closing university and college campuses. A host of concerns emerged that universities and colleges were unprepared to address, such as:

- Inability of colleges and universities to control the spread of COVID-19.
- Fears and anxieties of contracting the disease from faculty, staff, and students.
- Ambiguous long-term legal obligations and implications.
- Unlikelihood of student compliance with social distancing guidelines.
- Short and long-term financial ramifications.

While it was wise and warranted to suspend classes and close campuses, there was an immediate corresponding pressure to provide widespread online instruction. Institutions were forced to proceed with online instruction (watered-down versions of online education), whether prepared or not, while depending on the resources they had available.

A prime opportunity for the field of distance education has presented itself. Colleges, universities and most educational systems across the world must now find ways to provide continuous instruction without students physically entering classrooms. This scenario highlights the precise definition of distance education.

Distance Education: The organization and management of institution-based planned learning that normally occurs in a different place from teaching, requiring special course design and instruction techniques, communication through various technologies, and special organizational and administrative arrangements (Moore and Kearsley, 2005).

Distance education, its functionality, convenience and credibility occupy center stage for all to witness. Distance education is an optimal resolution for educational instruction in pandemic situations. However, what ensued fell short of expectations.

The virus's impact initially struck higher education with seven weeks remaining in the semester. Higher education providers reacted diversely, while most institutions closed their campuses, many reverted to what is termed 'Emergency Remote Teaching' (Hodges, 2020).

Emergency remote teaching is different from quality distance education and served as a short-term, online compromise until the pandemic could be resolved or until better strategies were put in place. Officially, emergency remote teaching (ERT) is a 'temporary shift of instructional delivery to an alternative delivery mode due to crisis circumstances,' making it a provisional, unsustainable form of teaching and learning (Crawford, 2020). The urgency of educating an institution's entire student body online was not implemented as a sustainable form of teaching and learning but rather as a provisional means of continuing operation.

When well-organized and managed, with proper training and planning, distance education is productive. Training, especially of faculty, and preparation are far more intricate than connecting to a technology such as Zoom and lecturing face-to-face. As noted by Hodges (2020), while most campuses had technology support services, support does not supplant quality training and development. Faculty members were not omitted from the pandemic. Many were experiencing personal, pandemic –related stress and became even more resistant to the basic standards of digital pedagogy and faculty struggled to abruptly convert instructional delivery practices in the midst of uncertainty (Hodges, 2020).

Faculty recalcitrance is just one example of the challenges that surfaced during emergency remote teaching. Limited internet access, sustained student engagement and

retention, social isolation, and the pandemic itself (students and faculty falling ill) contributed to frustrating educational experiences in Spring 2020. Hence, emergency remote teaching and the absence of well-planned distance education led to confusion, displeasure and the resurgence of familiar negative stereotypes around distance education, such as its *inferiority* to face-to-face instruction (Duffy et al, 2005). Contrary to these outdated, inaccurate assumptions, distance education offers an array of effective teaching and learning alternatives. Emergency remote teaching offered during COVID-19 is not one of them.

COVID-19 and Higher Education, Act II.

The 2020 fall semester offered higher education a second opportunity to tackle COVID-19 and transition away from emergency remote teaching. Colleges and universities chose varying methods to provide instruction; some institutions opted to close campus completely and to operate entirely online, while others opened with smaller student bodies and still others developed hybrid models for instructional delivery.

The University of North Carolina-Chapel Hill (UNC) chose the hybrid model and operated at half its residential capacity. They offered half of their courses in a traditional format and the remaining courses online, although *online* was a much-improved version from emergency remote teaching. UNC's decision to open the university and allow students on campus would not last. On August 17, 2020, as reported in *The News and Observer*, UNC reversed its decision to provide traditional classes when 130 additional students tested positive for COVID-19. Testing revealed four active COVID-19 cluster groups in dormitories, campus apartments and a fraternity house. The rush to open the campus may have obstructed the bigger picture and exposed the university to additional risks.

UNC's leadership believed many students would not have consistent access to the Internet if they were not on campus. Although true, the decision to allow international students, athletes and other students to remain on campus resulted in COVID-19 spikes, and the infections were not limited to students. Faculty members still had to provide instruction. Dormitories still had to be cleaned and maintained, and the dining halls still had to operate. As a result, forty-five UNC staff members also tested positive for Covid-19. The faculty's union, the NC Public Service Workers Union UE Local 150, defended their members by filing litigation against the university. The union asserted the university prioritized tuition and profit over protecting university stakeholders. At the time of this writing, litigation is still active.

The University of Missouri also welcomed returning students. During the first seven days of the fall semester 2020, the University of Missouri confirmed that more than 300 students tested positive for COVID-19 (Dave, 2020). The county's seven-day positivity rate in August soared from 10% to 44% once students returned. Despite the number of cases and rate of infection projections, the university opted not switch to an 'online only' environment.

When compared to UNC's decision to provide courses exclusively online, the University of Missouri's president acknowledged the similarities between the two universities and their respective counties. His rationale for not closing campus was based in part on death statistics. At the time, North Carolina's county recorded 50 COVID-19 related deaths comparatively to ten in Missouri's county. The president suggested his institution had better equipped medical facilities and moved forward with the university's plan to move some classes online, but he had no intention to suspend in-person classes. However, Missouri health officials immediately implemented restrictions to protect students, including a 9pm alcohol cutoff, no dance floors, a 10pm closing time for restaurants and all food and drinks must be consumed at seated tables. In

August 2020, (two weeks after the start of classes) the University of Missouri surpassed 543 COVID-19 cases. (Dave, 2020).

Discussion

COVID-19 created a global pandemic, the impact of which is yet to be fully understood. While epidemiologists have forecasted the lingering effects from the coronavirus will enter 2022, their long-term analysis has suggested the repercussions from COVID-19 may become endemic (Shaman, 2020).

Extraordinary times present extraordinary opportunities. Just such an opportunity has been presented to the field distance education. The pandemic has forced residential colleges and universities to implement emergency remote teaching, highlighting the praises and perils of distance education. Certainly, while distance education must improve in many areas, it remains the appropriate recourse for higher education's battle against coronavirus, drastically reducing the risks of face-to-face instruction.

Ultimately, while there is not a "one size fits all" solution to address the effects of COVID-19, there are several considerations that can assist university officials in making better decisions. In the next section, I identify several considerations to enhance university policies and strategies as they debate how to move education forward in these trying times. The purpose of providing these considerations is to provide institutions with information that will improve and broaden their distance education initiatives and counteract impending concerns about academic disruption, declining revenue, and substandard teaching and learning practices, and outcomes.

Considerations for University Planning and Strategy

Create and Update the Pandemic Plan

Thousands of students gather daily on college campuses with minimal regard for major incidents. Occasionally, the need to combat crises occurs. Colleges and universities have emergency protocols, active shooter procedures, disaster plans and employ risk management personnel to implement, review and revise these procedures. However, as demonstrated by COVID-19, most institutions did not have pandemic (or appropriate biomedical outbreak) plans.

Emergency plans created by institutions primarily address the needs among residential students and the operation of physical assets on campus. The online student population is often slighted, despite the fact these students need a plan that is tailored and accountable to their distinct needs (Holzweiss, 2020). The plan may not be pandemic specific, but it should be routinely updated and address potential scenarios where disruptions occurs between online students and the institution. Examples include the following:

- Identifying Potential Challenges and Crisis Events for Remediation
- Avoiding Academic Interruption | Clarifying Faculty Roles and Expectations
- Information Dissemination Specific for Online Students
- Managing and Altering the Academic Calendar, Grades and Classes
- Economic Considerations | Refunds, Credits and Student Withdrawals

Re-evaluate Employee Structures

COVID-19 brought notoriety to the term ‘essential personnel’ and the roles of employees often required to work during business closures. The pandemic created massive job losses among nonessential workers and encouraged work from home initiatives intended to slow the spread of coronavirus.

The work from home movement is cause for concern on college campuses. As universities closed and campuses shifted instruction online, faculty members were overloaded, while staff and hourly employees were increasingly furloughed. Empty campuses have created financial strain on already fractured budgets, which will ultimately impact personnel decisions. University payrolls are the largest expense items on organizational budgets. The reality is most institutions are not capable of maintaining their full workforce during a pandemic and sizeable cuts, layoffs and employee terminations will become unavoidable.

As a response, institutions may consider downsizing their permanent staff and outsourcing more services to create more financial flexibility. Shifting “toward outsourcing and online education produces greater stratification in higher education” and more institutions will explore “moving people costs from fixed to variable” (Kim, 2020). In Kim’s article “COVID-19 and the Future of Higher Ed Staff” (2020), he recognizes cloud-based technologies might align well with the outsourcing of alumni affairs, student counseling and human resource positions. Tenure is a prominent area where institutions are transitioning from fixed to variable employee costs, as the hiring for adjunct and affiliate instructors has outpaced tenure-track hiring. While institutions may be forced to reevaluate their workforce, delivering education remains the primary objective in higher education. As such, distance education has become a vital component driving this objective and DE’s employees must not be forgotten as the essential personnel required to operate distance education systems.

Course Content Collaboration

Course development processes for online delivery are expensive, time-consuming and require specialized skills. Creating new academic programming is an even more exhaustive process. At Penn State’s World Campus, the program development process receives substantial

contributions from at least five subunits with expenses far exceeding residential instruction. Over time and with scale, price points have become manageable for successful courses and programs, but the number of employees required, their compensation and their time invested in creating content may be better prioritized

We can easily identify quality distance education courses (Scharf, 2017). To modify and maintain them generally requires refreshing content. Instead of creating and developing individualized versions of online content within every program and department among every DE organization, forming a collaborative team among participating institutions or departments to produce high quality standardized content saves resources and frees up instructional designers and faculty time. Instead of ‘competing against’, programs and departments should ‘collaborate with’ and share resources to deliver a superior product at a fraction of the cost. Logistical concerns, university branding, and the distinct individual nuances of each institution would not diminish. Establishing collaborative partnerships to create, develop and maintain distance education content offers similar advantages to institutional licensing agreements with learning management systems providers. The commitment to provide quality content would provide a platform on which partnerships could expand to include emphases on excellence in online teaching practices. As discussed earlier, there are severe consequences to ineffective teaching and learning in distance education.

Additional Research

Areas for further research are still relevant, necessary, and lacking in financial forecasting, income generation and revenue models for institutions providing online education. Although online enrollments have increased, the disruption caused by COVID-19, along with diminishing state appropriations will not allow tuition increases to offset institutions’ financial

shortfalls. Institutions will benefit from an ability to precisely identify, understand and track the income and expenses required to solicit, retain and graduate online students. According to Cheslock & Jaquette (2020), this research “will be challenging to enact because existing data sets do not separately report financial figures for in-person and online education, but the payoff to overcoming this challenge is large.” To understand and manipulate online revenue and expenses at the highest level is uncommon for many dual-mode institutions, but such mastery may advance distance education and reduce financial uncertainty for its stakeholders.

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Appendix A

Informed Consent Form

INFORMED CONSENT FORM FOR SOCIAL SCIENCE RESEARCH

The Pennsylvania State University

Title of Project: Distance Education: Constructing Social Structures at Dual-mode Universities

Principal Investigator: Anthony Williams, Northbrook Lane, State College, PA
PA 16803 (814) 863-7641 axw176@psu.edu

Advisor: Ian Baptiste, PIC, Adult Education, 305B Keller Building, University Park, PA
16802

ieb1@psu.edu

1. Purpose of the Study: The purpose of this research study seeks to identify and describe the social structure of an effective distance education organization. Specifically, the researcher seeks a better understanding of the internal make up of Penn State World Campus.
2. Procedures to be followed: You will be asked to respond to interview questions. The interview will be audio recorded.
3. Discomforts and Risks: There are no risks in participating in this research beyond those experienced in everyday life.
4. Benefits: This research may provide a better understanding of an organization's social structure. This study aims to produce to a better understanding of the organizational subunits and explicit actions that contribute to sustaining successful distance education organizations.
5. Duration: It will take approximately 60 minutes to complete the interview.
6. Statement of Confidentiality: Only the person in charge, and his advisor will know your identity and have access to the audiotapes. When this research is published, no information identifying you will be written. The audiotapes will be secured in a locked desk and destroyed within two years.
7. Right to Ask Questions: You can ask questions about the research. The person in charge will answer your questions. Contact Anthony Williams at 861-6773 with questions. If you have questions about your rights as a research participant, contact Penn State's Office for Research Protections at (814) 865-1775.
8. Voluntary Participation: You do not have to participate in this research. You can end your participation at any time by telling the person in charge. You do not have to answer any questions you do not want to answer.

You must be 18 years of age or older to consent to participate in this research study. If you consent to participate in this research study and to the terms above, please sign your name and indicate the date below.

You will be given a copy of this consent form to keep for your records.

Participant Signature

Date

The informed consent procedure has been followed.

Investigator Signature

Date

Appendix B

Invitation and Follow-up Email

Hello Blake W.:

I am writing to follow-up on our conversation yesterday. The research study seeks to identify and describe the internal operations of the World Campus. The literature defines these internal relationships and coordination efforts as the social structure of the organization. Essentially, I am asking what distinguishes the World Campus from similar organizations.

Please note that your confidentiality is fully protected. In this study as well as any future reports, you will not be identified by name; instead you will be assigned a participant number. If you are still available and interested in participating in the study, please call or email me so we can establish an interview time.

Thank you,

Anthony
3-4872

Appendix C

Potential Interview Ideas

Personal

1. Tell me about yourself and your professional experiences.
2. Tell me about the path that led you here.
3. What is your title- how long have you been here? What exactly do you do?

Organization as a Whole

1. What are the department's responsibilities?
2. Describe your department.
3. How would you describe the World Campus (WC)? Purpose, demographics, fit with PSU?
4. How are programs created and developed?
5. Describe the strengths and weaknesses of that process.
6. If you had the power to change anything about the WC, what would you change and why?
7. How is the WC different from similar DE organizations?
8. What are the WC major priorities and concerns?
9. What threatens the WC?
10. How are those threats addressed?
11. How did the WC come to evolve in its current form?
12. Tell me about the design/model considerations (dual-mode, not for profit...)
13. Were those threats you mentioned earlier thought about when the design/model was constructed?

Internal Makeup

1. Where are the major sources of power?
2. What types of actions are absolutely essential to operate this organization?
3. What are the best ways to achieve those actions?
4. Identify one thing that hurts this organization.
5. How would you describe the communication processes and distribution of information throughout the organization?
6. Describe the complete process of a (depending on their area) course being developed, or registration process, securing faculty, distribution of funds, marketing a program, student support mechanisms... etc.
7. How should the process work? What changes will make the process better?

Intangibles (Social Control)

1. Talk about what's rewarded and how.
2. What actions will draw negative reactions?
3. Tell me about the organization's culture.
4. How is leadership exhibited?
5. Tell me about the intangibles that are not formally identified but are salient for success.
6. What is distinctive about this organization in comparison to similar organizations?

Appendix D

World Campus Program Criteria

Academic Reputation

- * Program reputation. The program is of high quality and is recognized as a leader in the field. The program has been highly ranked as compared to other similar programs.

Academic Readiness

- * Program status. Does the program exist in a campus-based environment? How much revision is required to restructure the existing program within a distance education format? When can the program be ready to be launched?
- * Department commitment. There should be an on-going interest and commitment to the online program by the academic unit. There should be administrative support and faculty interest.
- * Department capacity. Ability of the academic unit to support an expanded curriculum, additional course sections, and increased number of students while maintaining teaching and learning quality.
- * Strategic importance. The program should be consistent with the academic unit's strategic goals of providing access to new audiences, enhancing dissemination of research, and enhancing relationships with key industries and professions.

Appropriate Technology

Access to technology. What level of technology do audience members have access to? Where is the access? Home? Office?

Facility with technology. How sophisticated are audience members in terms of using technology?

Mix of technologies. Which technologies or mix of technologies do audience members prefer?

Sustainable Market

- * Interest by potential audience. How interested are members of the potential audience in the program? What are their motivations?
 - * Unique market niche. The program should represent a unique "niche" for Penn State, filling a need that is not easily met by others.
- Clarity/accessibility of potential audience. Is the potential audience clearly defined? Has Penn State developed a relationship with the target audience? (Audience has participated in other programs, etc.)
- Occupational demand. Is there evidence that there is occupational demand for individuals who successfully complete the program?

Income Potential

Ability to pay. Is the potential audience able to afford the program? Is there potential for employer support?

Scalability

- * Size of potential audience. How large is the potential audience? Will the potential audience increase over time?

Partnering potential. Is there potential to partner with business and industry, associations, or other entities such as other universities?

- * The academic unit will provide some or all of the information.

Appendix E

Program Plan

PROGRAM PLAN: 2005-06 and 2006-07

PROGRAM PLAN TO INCLUDE THE FOLLOWING COMPONENTS

- Introduction/Brief Program Description
- Program Team (GRS Levels 1-3) or Liaisons and Communications (GRS Level 4 only)
- Logistics for the two-year period -- Items 1-3 typically are presented in narrative and chart form
 1. Planned course development and roll out schedule
 2. Course instructor assignments
 3. Anticipated annual enrollments by course and program
 4. Who has operational responsibility for student academic advising
 5. Course start dates
 6. Program unique/specific agreements that need to be in writing
- GRS Sharing Level specified
 1. WC costs the AU will pay from it share of gross revenue (GRS Level 4 only)

EXAMPLE

PROGRAM PLAN: 2005-06 and 2006-07

M.Ed. in Curriculum and Instruction – Teacher Leadership Emphasis To Be Delivered Online via the World Campus

PAR: 12/1/04

The M.Ed. in Curriculum and Instruction is a 30-credit professional master's degree, which opened as a World Campus Delivering in the summer of 2003. The degree includes a core of nine credits, a specialization or emphasis of 15 credits, and at least six credits of advisor-approved electives.

The core is comprised of three courses (i.e., CI 550, EDLDR 560 and EDPSY 421). The courses and the electives form a "staging area" during which time students can determine if they are interested in pursuing the degree or individual courses for professional development. Students who complete the core courses and are accepted into the M.Ed. enter a pool out of which student cohorts will be formed for completing the specialization/emphasis course work (CI 501 and EDLDR 551, 553, 563, 596).

Program Team

An assigned Program Team will continue to facilitate shared and creative problem solving, will include:

- World Campus Program Manager – _____ from the World Campus Program Planning and Management Unit will serve in this role to ensure good coordination among participating World Campus professional staff and act as ongoing liaison with the Academic Unit. He/she also will have responsibility for monitoring the World Campus portion of the budget and roll-out schedule.
- Lead Faculty Member – _____ from the Academic Unit will serve in this role to ensure good coordination among participating faculty and ongoing liaison with the World Campus.
- Program Marketing Associate – _____ from Outreach Marketing Services will be responsible for developing a marketing plan for approval by the Program Team and for implementing the plan in coordination with the Outreach offices of Market Research, Client Development, and Marketing Communications.
- Student Services Liaison – _____ from Outreach Student Services will be responsible for serving as an effective liaison for registration, records, materials distribution, technical support, and advising when applicable.
- Lead Instructional Designer – _____ from the World Campus Instructional Design and Development Unit will provide a single point of coordination between faculty and the instructional design resources of the World Campus, ensuring the finished courses meet the technical requirements for World Campus delivery.

Logistics

Figure 1 provides the planned course delivery schedule for 2005-06 and 2006-07. It also provides information on instructor assignments and anticipated enrollments in the individual courses and the Program for the period. Variance from this schedule will be by mutual agreement of the Academic Unit and World Campus.

The start dates for Program courses Delivered via the World Campus in 2005-06 and 2006-07 will be as follows:

Fall 2005	August 28, 2005
Spring 2006	January 10, 2006
Summer 2006	June 13, 2006
Fall 2006	August 26, 2005
Spring 2007	January 8, 2006
Summer 2007	June 11, 2006

Because this is a master's degree program the EDLDR faculty will assume responsibility for student academic advising.

Those sections of emphasis courses that enroll more than 25 students will have faculty assistant funding added at the 26th enrollment. Upon the enrollment of the 20th student in an emphasis courses....

If the number of students in a course drops below the number needed to cover delivery costs, a joint decision will be made by the Lead Faculty Member and World Campus Program Manager on what action, if any, will be taken (e.g., merging course sections, merging course sections and adding TA support). Similarly, if the number of students in a cohort drops below the number needed to cover delivery costs, a joint decision will be made by the Lead Faculty Member and Program Manager, on what action, if any, will be taken (e.g., merging cohorts).

[Deleted the following section if agreement on GRS Level
is not reached at the time the Program Plan is developed]

Revenue Sharing

The Academic Unit and the World Campus agree to operate the Program under Gross Revenue Sharing Level One, as per the Gross Revenue Sharing Policy (*Proposal for a Gross Revenue Sharing Model for Penn State World Campus and Continuing Education at University Park*), adopted by the University Outreach Council in November 2004. Gross revenue is defined as the actual tuition income for the program.

Approved:

Name
Lead Faculty Member for the Program

Name
Sr. Program Manager, World Campus

Name
Head, Department

Senior Director, World Campus

Name
Associate Dean for Outreach

Associate Vice President for Outreach

Appendix F

Program Agreement

The (Academic Unit), a unit of the (College), desires to deliver /continue to deliver a (Program) via the Penn State World Campus. The (Program) is intended for location-bound adults who desire to [Add other information on the program that needs to be emphasized] The (Program) has been delivered via the World Campus since _____. This is the first delivery of the (Program) via the World Campus.

This agreement confirms a mutual commitment on the part of the (Academic Unit) and the World Campus to deliver the (Program) at a distance to an audience statewide, nationally and internationally across 2005-06 and 2006-07. This agreement also confirms the operational and financial arrangements between the (Academic Units) and the World Campus in offering the (Program) over that two-year period.

Guiding Policies

The implementation of this agreement will be guided by the following three policies and procedures.

The *World Campus Administrative Manual* outlines the operational processes for the World Campus. A copy is available upon request.

The *Technical Standards and Pedagogical Guidelines for Online and Blended Courses Delivered Between Penn State Locations and to External Students*, which was adopted by the eLearning Cooperative Steering Committee in fall 2004, presents the quality technical standards (see URL <https://webhosting.its.psu.edu/elearning/standards.cfm>).

Financial arrangements between the (Academic Unit) and World Campus will follow the *Proposal for a Gross Revenue Sharing Model for Penn State World Campus and Continuing Education at University Park*, which was adopted by the University Outreach Council in November 2004. This document is otherwise known as the “Gross Revenue Sharing Policy.”

Program Plan

Appendix A contains the Program Plan jointly developed by the (Academic Unit) and World Campus for the distance delivery of the (Program) across 2005-06 and 2006-07. The Plan provides information about the (Academic Unit) and World Campus Program Team that will oversee implementation of the Program Plan, course roll-out and delivery, course author and instructor assignments, and anticipated enrollments in the individual courses and the (Program).

General Roles and Responsibilities

The (Academic Unit) and the World Campus mutually agree to deliver this program under Gross Revenue Sharing Level One, as per the Gross Revenue Sharing Policy, over the term of this agreement. As a Gross Revenue Sharing Level One program, the World Campus assumes all operational and financial obligations for program and course development and delivery. Specific roles and responsibilities are noted below.

Instructional Responsibilities

The Program Plan (Appendix A) presents the planned course delivery schedule for 2005-06 and 2006-07. The (Academic Unit) has academic authority and operational responsibility for instruction. The World Campus has agreed to take financial responsibility for instruction. The latter includes: compensating course instructors, the lead faculty member, any academic support staff (e.g., program-dedicated staff assistant time), and faculty assistants, as well as any instruction-related direct costs (e.g., copies of software and/or textbooks for instructors, program-related travel for the lead faculty member and instructors, professional development for the lead faculty member and/or instructors).

Instructional Design and Development Responsibilities

The World Campus agrees to take operational and financial responsibility for the instructional design and development tasks associated with course and program development, delivery and revision. For initial course development, these tasks include course management services, instructional materials management, course instructional design and course/event materials development. For first time course delivery, these tasks include: learning management system (ANGEL) integration and administration, course materials production, instructional materials administration, and course implementation administration. For subsequent course offerings, the World Campus also has operational and financial responsibility for course revisions. These tasks will be performed by World Campus staff consistent with the quality technical standards adopted by the Penn State eLearning Cooperative.

Marketing Responsibilities

The World Campus agrees to take operational and financial responsibility for marketing the (Program) to new adult learners. The (Program) will be included in the marketing plan for the entire portfolio of programs delivered through the World Campus. As part of that plan, the (Program) will be included in the World Campus print catalog, on the World Campus web site, and in other portfolio-wide print and online materials. When appropriate, marketing via partnership development activities also will be included. Marketing materials will be updated annually, as needed, with input from the (Academic Unit).

Additionally, the World Campus marketing group will design and execute a marketing plan in response to the enrollment goals for the (Program), marketing opportunities and other

marketplace considerations. The expertise of the (Academic Unit) will be solicited in the development and execution of the marketing plan.

Student Services Responsibilities

The World Campus will have operational and financial responsibility for student services through Outreach Student Services, which will provide standard services for: call center intake, pre-admissions counseling, registration and records, and technical help desk assistance for students and instructors. The World Campus also will have operational responsibility for providing student academic advising, as noted in the Program Plan (see Appendix A), and the (Academic Unit) agrees to assist in orientating advisors, as needed, at its expense.

Other Program Delivery Responsibilities

The World Campus agrees to take operational responsibility for the following additional program delivery services: program planning and management, budget and finance, arrangements for University support services (i.e., University server rental for the storage of course content, University library support), data management infrastructure, and program evaluation. These services are the financial responsibility of the World Campus.

Revenue Sharing and Transfer of Funds

The (Academic Unit) receives 10% of gross revenue, and World Campus receives 90% of gross revenue, with gross revenue defined as the actual tuition income for the program. Total enrollments in the (Program) are anticipated to be ___ in 2005-06 and ___ in 2006-07. If these enrollments materialize the share of gross revenue for the (Academic Unit) is estimated to be \$_____ for 2005-06 and \$_____ for 2006-07 under Gross Revenue Sharing Level One. Because 2005-06 and 2006-07 World Campus tuition rates were not known at the time this agreement was prepared, these estimates are based upon 2004-05 World Campus tuition rates. Also, the number of enrollments are not guaranteed. The World Campus agrees to transfer the (Academic Unit)'s share of gross revenue to the (College), within 30 business days of the end of each quarter of the fiscal year (i.e., September 30, December 31, March 31 and June 30) based upon actual enrollments. This transaction will be completed by the World Campus Budget and Finance Office by initiating an Interdepartmental Transfer of funds (IDCC) to the College Financial Office.

Vita

Anthony Williams, Jr., D.Ed.

2005

awmsjr1@gmail.com

EDUCATION

THE PENNSYLVANIA STATE UNIVERSITY, University Park, PA

Doctor of Education, Higher/Adult Education

Areas of Research and Publication: Effective Administration, Organizational Management and Distance Education

UNIVERSITY OF BRITISH COLUMBIA, Vancouver, BC

Post Graduate Certification Training in Technology Based Distributed Learning

Worked with Dr. Tony Bates, Director, Distance Education and Technology. Selected experience included: Developing, Designing and Delivering Technology Based Distributed Learning; Selecting and Using Technologies; Planning and Managing in Organizations; Social and Policy Issues in Technology; Researching and Evaluating Distributed Learning.

NORFOLK STATE UNIVERSITY, Norfolk, VA

Master of Arts, Communication and Public Relations

Bachelor of Science, Building Construction Technology

Associate of Science, Architectural Drafting

PROFESSIONAL EXPERIENCES (Selected & Abbreviated- 74 Consulting Contracts)

SNH ENTERPRISES, INC. Charlotte, NC

Senior Consultant

Provide leadership, guidance and consultation for academic and corporate clients. (FIPSE) Fund for the Improvement of Post-Secondary Education Advisor for more than 44 colleges and universities. Preferred Evaluator listing in the following fields: Organization Analysis, Program Development, Academic and Curriculum Revision, Retention Strategies, Distance Education and online environments, Higher Education.

THE PENNSYLVANIA STATE UNIVERSITY, University Park PA

American Center for the Study of Distance Education

Develop, critique and disseminate peer-reviewed scholarship and publication in distance education and technology. Create, revise and maintain the Center's web-based resources (publications, research, symposia, leadership institutes, and moderated listserv). Revised technology content manage site and provide leadership, research and vision in virtual environments, international partnerships and effective distance education practices.

TEXAS SOUTHERN UNIVERSITY, Houston TX

College of Continuing Education

Distributed Learning

Developed and secured business opportunities for the College of Continuing Education via asynchronous learning. Authored and awarded grants related to distance education and technology improvement. Consultant for Collegis, Inc., developed, delivered and managed IT-based certifications and programs. Aligned and assessed curriculum to fulfill continuing education credit and professional certifications.

THE UNIVERSITY OF NORTH CAROLINA at CHAPEL HILL

Instructional and Information Systems

Instructional Technology

Provided leadership and consultation expertise for The Center for Distance Learning and its in technology-based course development, student interaction, choice of delivery medium, continuing education, certification and related technological decisions. Assisted faculty; developed, implemented and assessed instructional pedagogy and expectations for online teaching. Project management; responsible for supervising the technical support associated with design, scope, specification, development and implementation of web-based courses. Provided long-range planning for distributed learning services.