



Distance Education and the University Culture:

**Creating a Policy Environment
for Distance Education**

The Report of Three Policy Symposia
held as part of the
Innovations in Distance Education Project

Partially funded by a grant from
The AT&T Foundation

1995–1998

PENNSSTATE



Table of Contents

Foreword	1
Introduction	2
The Delphi Process	4
Symposium 1: Administrative Policy in Distance Education	6
Symposium 2: Policy in Support of Faculty Participation in Distance Education	16
Symposium 3: Policy in Support of the Distance Learner	30
Appendix A: Strategies to Secure Institutional Commitment	44
Appendix B: Symposia Participants and Staff	47
Appendix C: Delphi Process Questions and Results	64

Foreword

The advent of compressed video in the late 1980s and more recent developments in on-line computing and the World Wide Web have led to significant changes in how colleges and universities provide distance education. Once seen as a component of continuing education, distance education is now moving into the mainstream of higher education. Increasingly, higher education administrators are recognizing that the emergence of distance education within traditional institutions requires a change in the institutional culture and in the policies by which institutions define and ensure quality and promote and reward change.

Beginning in 1995, Penn State received a series of three annual grants from the AT&T Foundation to help facilitate the process of cultural change regarding distance education within the University. This is a report of one component of that three-year project—invitational seminars that brought together institutional leaders to address policy issues surrounding the mainstreaming of distance education.

Continuing and distance education directors and academic administrators from nineteen higher education institutions participated in the three Innovations in Distance Education Policy Symposia which were held at *The Penn Stater Conference Center Hotel* on October 1–3, 1995; September 29–October 1, 1996; and May 12–14, 1998. Participating institutions included eleven Committee on Institutional Cooperation (CIC) institutions and eight historically Black institutions (see Appendix B). During the 1995 symposium, participants discussed administrative and financial policy issues affecting the adoption of distance education within their institutions. At the 1996 symposium, the group reconvened to deliberate “faculty’s pivotal role in distance education” and the policies necessary to support faculty participation in distance education. The third symposium focused on the distance learner’s perspective—learner participation, curriculum development, and support systems and services.

The purpose of this document is to share symposia participants’ conclusions about how to change institutional policies that inhibit effective adoption of distance education. It also includes their recommendations for the development of new policies to help bring about change in a sometimes resistant organizational culture. The report reflects the consensus of discussions held during the three symposia. It is the hope of those who helped contribute to this document that it will serve as a guide for institutions that want to provide education that meets the needs of learners without restricting them by time or geographic location.

Introduction

Distance education can no longer be viewed as a separate entity on the periphery of the academic enterprise. Nor is it simply a means to extend the university to new audiences. Given the rapid changes in the technology of distance education and the equally rapid changes in society's need for new approaches to learning in the Information Age, distance education is more properly seen as an integral part of the spectrum of instructional options in higher education. Most importantly, it can serve as a catalyst for creating new teaching and learning environments in which administrators, faculty, and students examine and enhance the way they conceptualize instruction. As one policy symposium participant noted, "We can do two things at once, improve learning and teaching while improving access to the knowledge of the university through technology." We are living in a networked world, and higher education institutions can no longer develop policy in isolation from other social institutions.

As we grapple with these issues, it is not unusual for us first to stumble over the very language we use to define policy. For instance, some institutions ask for "comparability" between policies that guide the quality of distance education and those that guide classroom instruction. Some policy symposia participants argued for "parity" between distance education and resident instruction. Others contended that institutions need a new policy vocabulary that erases artificial distinctions between campus and distant "delivery systems" and instead allows institutions to focus on the relationship between the institution and the learner. These may seem like superficial distinctions, but they can become significant when attempting to work out the details of institutional policy.

Regardless of language, the consensus of policy symposia participants was clear: Institutional policies should *incorporate*, not just accommodate, distance education. To do so, institutions need to consider their guiding principles, the barriers to integration, and the functions of policy.

- **Guiding Principles**—What is the guiding vision for distance education within the institution? How does this vision fit into the institutional mission? Without understanding the role of distance education within the context of the institutional vision and mission, it is extremely difficult to resolve policy issues. However, if distance education is clearly understood as integral to the overall institutional mission, then the policy issues become more transparent and change becomes more manageable.

- **The Need for Integration**—Mainstreaming of distance education requires that institutions not establish new and separate policies for distance education but that they integrate distance education into the existing policy framework. This means that policy makers should identify specific policy barriers, revisit the assumptions behind those policies, and revise the policies in question or devise new policies that recognize distance education as one of several ways of delivering education to students.
- **Functions of Policy**—Policies serve as “levers” that create incentives and disincentives, or positive and negative implications for institutional action. Policies shape institutional behavior in three primary ways:
 - ÆPolicies control how *resources* are allocated;
 - ÆPolicies can be used to establish *rules and regulations* to guide institutions’ actions;
 - ÆPolicies can create reporting systems that establish institutional *accountability* for actions.

Each of these functions of policy has a role to play in changing the institutional culture.

The three policy symposia being summarized in this document provided specific ideas and guidelines for each of these three functional areas. Administrative and financial issues were considered in the first symposium. Issues of faculty participation in distance education were examined in the second symposium. In the third symposium, the issues were addressed from the distant learner’s perspective. They included learner participation, curriculum development, and support systems and services.

The Delphi Process

The Delphi process was used to identify topics for discussion prior to convening each of the three policy symposia. The technique, developed in the 1950s, was named for the oracles at Delphi, Greece, who forecast events. Moore, in his book Group Techniques for Idea Building, notes that the Delphi process was first used, and still is viewed by many, primarily as a forecasting tool.¹ But as Moore also noted, the Delphi process also can be used to identify a group's goals and objectives, establish priorities, and gather information. The technique is particularly useful in situations such as that which faced the planners of the policy symposia. The individuals involved were asked to examine a complex issue, had diverse backgrounds, and found it impractical to attend frequent face-to-face group meetings prior to the symposia.

The Delphi process involves a series of questionnaires designed to determine the viewpoint of a particular group about a set of complex questions. Results of the initial questionnaire are used to compile follow-up questionnaires for the respondent group whose members have an opportunity to reconsider their original answers after seeing the group response. The primary goal is to ensure that the range of options regarding the issue(s) in question are identified.

In Round 1 of the Delphi process for the IDE project, conducted in 1995, participants were asked two main questions. The first asked them to identify critical issues that affect the adoption of distance education within their university or college. The second asked them to consider and identify institutional policies that inhibit or support adoption of distance education in higher education institutions like their own. A content analysis of the data collected in Round 1 resulted in the issues contributed being divided into four categories. In subsequent rounds participants ranked the categories in order of priority and determined the order in which the issues would be addressed at the three policy symposia.

It should be noted that an outcome of the 1996 symposium was that participants requested that learner participation issues, a topic not previously identified, be added to the agenda for the final symposium.

In preparation for each policy symposium the original list of issues that was generated for the specific category that was to be addressed, was analyzed during two additional rounds of the Delphi process. In Rounds 2 and 3, rating scales were included to pinpoint which issues in a particular category were most critical to

¹ Moore, C. M. (1994). Group techniques for idea building (2nd ed.). Thousand Oaks, CA: Sage.

promoting the adoption of distance education in participants' higher-education institutions. In an effort to secure candid responses participants were assured of confidentiality and names and institutions were not identified with the responses. Results of the Delphi process for all three years are in Appendix C.

Symposium 1: Administrative Policy in Distance Education

Guiding Principles for Policy Development

Participants at the 1995 symposium agreed upon an overarching principle and a set of subprinciples that together can serve as a vision for distance education and help to direct the development of policy in support of distance education within higher education institutions. The principle agreed upon is as follows.

Distance education will be:

- ***an integral part of the mission of higher education;***
- ***a key component of the institution's overall goal of improving the teaching and learning process;***
- ***a significant component of the teaching, learning, and administrative environment of the twenty-first century university.***

This principle led to a set of subprinciples that clarify some of the implications of the general vision. They are stated here as goals or “future conditions,” which describe what distance education and the institution will look like when the vision is achieved:

1. Distance education will provide unparalleled opportunities for citizen access to the intellectual wealth of the university and thus will have the potential to democratize education in unprecedented ways.
2. Distance education will be used as a strategic tool to support individual institutional missions.
3. Academic units will utilize distance education as a means to meet their instructional and outreach missions.
4. Distance education will provide opportunities for faculty, administrators, and the students themselves to improve the quality of the educational experience.
5. The institutional governing structure will ensure access to communication and educational technology for all members of the academic community.
6. Faculty will be instructed in the design and delivery of effective distance education, and students will be oriented to the use of instructional technology.

7. The mechanism by which institutions fund instruction will be structured to facilitate a teaching and learning environment that is not bound by time and/or place.
8. Technology used for distance education will be fully integrated into the instructional infrastructure of the institution.

This overarching principle and its subprinciples serve to separate higher education from the tangle of technology. They emphasize that the most important implication of distance education is that it allows the institution to think freshly about its relationship to learners and to create new ways to articulate characteristics of the teaching/learning environment, not just for geographically distant students, but for all students. As one participant said, “We need to go back to our mission statement, remembering service and outreach.” Another person put it this way: “We are working at two levels—improving teaching and improving learning—each tied to the university’s mission, and responding to the educational needs of society.”

Policy Barriers and Policy Assumptions

Symposium participants recognized that an initial task for an institution engaged in developing policy to support distance education is to examine current institutional policy barriers. Much attention was given to this task during the first symposium. For example, it was noted that in many institutions, student residency requirements present a major hurdle and clearly inhibit the integration of distance education into the mainstream of higher education. Residency requirements were established to enhance educational experiences when resources were available only on university and college campuses. Now, when that is no longer true, the effect of such policies is to discriminate against students who cannot participate in on-campus education.

Participants agreed that conceptually, the infrastructure for distance education is not different from the infrastructure that supports resident instruction. If integration of distance education is to succeed, additional practices based on institutional policy must be addressed. They include:

- ó Fee assessments for students in distance education classes;
- ó Fees charged to out-of-state versus in-state students;
- ó Access by both resident and distant students to educational resources, such as library materials;
- ó Procedures for allocating the costs required to deliver distance education courses and for sharing any revenue generated by those courses;
- ó The effect of restricted access to technology by faculty and students when institutional needs channel limited financial resources into other areas.

Areas for Policy Development

Institutions wishing to bring distance education into the mainstream of their academic culture will need to address a broad range of policy issues. These will vary from institution to institution, but they may include any or all of those listed in the following pages.

1. Educational Goals

Learner-centered approaches to instruction have the potential to improve higher education, and distance education can serve as a catalyst toward that end. Significant institutional commitment to distance education represents a commitment to changing the traditional teaching/learning environment of higher education. Making this kind of change also would require altering policy in order to foster attitudinal and behavioral changes among faculty.

A related issue is quality: how it is determined, and how it will be monitored for on-line courses and transfer credits that are included in the curriculum. Institutions should be able to ensure, for society as well as for the individual distance learner, not only that the subject matter is mastered but also that social and leadership skills are developed. There need to be effective methods to evaluate students' learning, as well as the quality of the overall distance education experience.

2. Advantages to Participating in Distance Education

Reasons for participation should be explained not only to administrators and faculty, but also to students. Incentives for students include convenience, economic advantages, and the perception that the quality of distance education courses can be comparable to, or better than, that of resident instruction courses. A high percentage of resident students also are recognizing these advantages and are enrolling in distance education courses while on campus, much like the phenomenon of "using the Automated Teller Machine inside the bank." But we also need to improve our ability to reach non-traditional students at a distance from campus—particularly underserved populations including those with financial and other special needs.

With regard to faculty, some members may be willing to teach distance education courses if they are "on-load" rather than extra responsibility, and if doing so enhances their career. Administrators of academic units often indicate that the opportunity to share revenue is an important incentive that ensures their support of distance education. It is imperative to provide incentives to all three groups if the integration of distance education into higher education is to be realized.

3. Access to Technology and Other Resources

Access to information resources, including information traditionally found in libraries, remains a major issue for distance learners. Within the Committee on Institutional Cooperation (CIC) institutions, students now can access the CIC Virtual Electronic Library (VEL) database via the Internet, but a significant number of hard copy documents remain inaccessible to many.

Another issue that cannot be ignored is the lack of access to technology for some distance learners and faculty. Access is absolutely necessary if distance education is to become part of the mainstream of an institution. Fundamental to securing their participation is a guarantee that, at a minimum, faculty will have access to basic computer technology and to other communication technologies and tools. They may also require instructional support to redesign and deliver courses via appropriate media. To maximize the potential of distance education, technical support would need to be available twenty-four hours a day, seven days a week, for both students and faculty.

4. Administration of Distance Education

Appropriate placement of distance education within the organizational structure is a very important decision. The administrative “home” of distance education should be located so that instructional and technical support can best be integrated into the academic mainstream. In some institutions, it will be beneficial to combine distance education and continuing education when the latter already has support services in place, such as instructional design and technology support. In other institutions, however, distance education may not benefit from such an association if doing so means that it, like continuing education, would be viewed as an activity outside the mainstream of the institution’s core mission.

5. Centralization

Decentralization of distance education may produce duplicated efforts and costs and result in departments with discrete and limited areas of expertise in distance education. When distance education is centrally organized, its administrators often have direct access to individuals in positions of institutional authority. Also, centralization should mean more efficient use of resources.

6. Costs: Who Pays?

One financial model suggests that costs should be distributed equally among all students whether learning in residence or at a distance, to eliminate any differential charges among individuals based on the means by which they access higher education. Another model proposes that costs should be differentially distributed to reflect the different use of services. Yet another approach builds

funding for the logistical and communication costs of distance education into general infrastructure expenses, such as is done for buildings and academic support services. (Contract programs that would be billed to include the cost of overhead could constitute an exception to this position.)

7. Intra-/Inter-institutional Sharing

Because of the significant start-up costs, distance education has the potential to widen the gap between the “haves” and the “have nots” among higher education institutions. Consequently, sharing of resources is not only desirable but may be necessary to ensure institutional well-being and equal access among institutions. Resource sharing and collaboration on courses and support systems should be considered at all levels, both within and among institutions. Potential funders may be more interested in consortium arrangements than in separate distance education initiatives, because they are perceived to be more cost-effective.

8. Curriculum Development and Intellectual Property Rights

Legal and ethical standards related to copyrights, intellectual property rights, and protected access associated with emerging technologies that are utilized to deliver information (such as the Internet) are not well-defined, articulated, or enforced. Institutions should define standards for ethical and legal practices regarding copyright, intellectual property rights and responsibilities, licensing, and common courtesy for digital communication, applicable to both students and faculty.

Administrative Policies to Support Distance Education

Symposium participants identified the following examples of policies that should be developed in support of the administrative aspect of distance education.

Resource Allocation

- 1. Provide support for distance education from the central resources of the institution.** This establishes distance education as part of the institutional infrastructure. To operationalize this policy the institution must decide which aspects of a distance education function should be considered infrastructure and which aspects should be considered operational expenses.
- 2. Establish a recognizable administrative unit with responsibility for distance education that works in collaboration with computer services, libraries, and other faculty and student support units.** The existing institutional culture will guide decisions regarding the balance between administrative centralization, coordination or shared authority, and individual unit initiative.
- 3. Provide centralized services to ensure effective implementation of policy.** Base-level support for distance education from central sources might include marketing, instructional design support, technology expertise, faculty support and reward, and professional development for faculty in the development and delivery of distance education courses.
- 4. Provide consistent student support services for all educational delivery systems within the institution.** Regardless of how the institution organizes distance education, it is absolutely essential to provide learners with such services as registration and advising.
- 5. Treat technology investments for distance education equally with regard to other instructional infrastructure investments, such as classroom buildings.** Central budgeting must establish, maintain, and upgrade technology and access to communication and information resources. Distance education is part of a larger change process brought on by the increasing complexity of technology; this mandates a long view of the role of technology at the institution. Therefore, the cost of distance technology should be amortized over time, just as other infrastructure costs would be.
- 6. Promote intra- and inter-institutional sharing of resources for distance education.** Pursue partnerships and consortia to provide financing for courses and instructional support. There is growing evidence that distance

education—and technology in general—is fostering new relationships among units within institutions. Equally important, new relationships among institutions within a state or across other organizational sectors are developing as well. Institutions should work to establish and maintain such relationships.

7. **Acknowledge the risks of innovation and seek out opportunities to minimize the costs of risk to an institution in order to promote and facilitate risk-taking.** Toward this end, institutions should vigorously pursue external funding with vendors, foundations, and other sources to supplement internal resources, especially at the beginning of a new initiative.

Rules and Regulations

1. **Reconsider basic institutional reward systems that primarily are defined by the classroom experience.** Reward systems need to be revisited if distance education is to move into the mainstream of the institution’s culture. For example, it may be necessary to redefine faculty “workload” and “use of time” to include on-line office hours and time spent in the “virtual classroom,” as well as time spent in classes on campus.
2. **Make no distinction between student credit hours generated through distance education and those generated by campus instruction.** Regulations that define quality often assume that out-of-classroom experiences are qualitatively different from those in class. For distance education—and the new teaching/learning opportunities that it presents—to reach its full potential, institutions should establish quality standards that recognize the increasingly diverse ways in which faculty and students interact with subject matter. When distance education is being used to extend the institution’s existing curriculum to new or nontraditional learners, these courses should carry the same course title, credit, and quality standards as other courses.
3. **Distribute distance education costs to eliminate differential payments among students.** Historically, institutions have not required students to pay differentially for courses taken in a large classroom versus a small classroom. The same philosophy should hold true for courses delivered by distance education or in the classroom. (Note that the use of technology for delivery of courses at a distance should not be confused with the use of technology to teach specific subject matter, such as the fees charged for the use of chemistry labs or even computer labs.)
4. **Devise new rules and regulations for the way income flows to units to support administration, instruction, and student services for distance education.** The key to many administrative policies is the way in which income

from student tuition flows back to academic units to support the curriculum. These rules should be revised and enhanced to ensure that academic units are not penalized for using distance education and to ensure that all faculty and students have equitable access to distance education resources.

5. **Establish standard guidelines for intra- and inter-institutional collaboration and interaction.** Distance education provides innumerable opportunities for institutions to forge partnerships that provide consistent, high-quality education to students from all participating organizations. As in any new endeavor that creates systems that did not previously exist, standards for interaction will be critical to the success of such collaborations.

Accountability

1. **Create institutional advisory committees, consisting of members of various university units, to focus on distance education policies and practices.** Incorporation of distance education into the mainstream of educational practice requires “buy in” by all key unit administrators who perceive that they will gain or lose as a result. Advisory committees are imperative for success in building ownership.
2. **Establish a recognizable distance education unit whose director reports directly to a chief academic officer.** Institutions that are successfully implementing distance education methods and technology attribute this success, in part, to having someone who “champions” the cause of distance education.
3. **Establish enhanced systems for documenting and evaluating faculty participation and involvement in distance education.** It is imperative that faculty contributions to distance education be rewarded. Meaningful rewards can be given only if there are systems in place that document and evaluate faculty participation.
4. **Establish inter-institutional committees to address the new forms of accountability for quality control that are emerging in the new distance education environment.** Repeatedly the issue of quality is raised as a concern when traditional face-to-face courses and programs are transformed for delivery via distance education. Such issues become more complex when instruction is delivered to multiple institutions, each with its own standards to be met. Therefore, institutions will need to address quality assurance issues through inter-institutional agreements.

5. **Put institutional structures in place to ensure that colleges and universities can be accountable to states and governing boards for their delivery of education via distance technology.** Accountability will become increasingly complex as institutions enter into collaborations that cross state, national, and international borders. Accountability to states and governing boards must also meet the imperatives of social and global responsibility that are emerging in our rapidly changing, information-based society.

Conclusion

The overriding belief that emerged from the first symposium was that distance education is much more than an extension of the university to new audiences via technology. Instead, distance education can serve as a catalyst for creating a new teaching and learning environment in which faculty, students, and administrators examine and change the way they conceptualize instruction. Symposium participants recognized that shared beliefs drive the policy-writing process. Consequently, one outcome of the symposium was the expression of these beliefs as purposes which provide the basis of policy statements. One approach for presenting these purposes and the related policy statements is presented below.

Purpose and Policy Defined

Purpose: To assure quality and integration of instruction wherever and whenever delivered

Policy #1: College and university credit should be dependent upon approval from an appropriate academic unit for both content and instruction.

Purpose: To reform delivery and increase access to the university knowledge base

Policy #2: Inducements (such as release time, sabbaticals and grants) should be available to faculty to improve and extend the teaching and learning experience.

Policy #3: Criteria for tenure and promotion should recognize excellence in teaching and learning, and leadership in the reform of teaching.

Policy #4: Institutions should provide faculty access to teaching and learning technologies, instructional design, and other support services, including faculty professional development in the use of these technologies.

Policy #5: Distance education should be considered a part of the regular workload and weighted for complexity, number of students, and development of new courses.

Purpose: To increase access by students to university resources

Policy #6: The university should advocate financial aid policies commensurate with changing learners' needs.

Policy #7: The proportion of costs reflected in tuition should not be affected by time or place of instruction.

Purpose: To promote "truth in advertising"

Policy #8: Students should be informed about the skills and technology necessary to complete a distance education course.

Purpose: To be sensitive to variations in learners' access to technology

Policy #9: Design and delivery should be provided in multiple modalities to accommodate a varied user base.

Symposium 2: Policy in Support of Faculty Participation in Distance Education

Faculty endorsement and commitment is at the heart of making distance learning a viable component of higher education. A change in institutional culture within the university can happen only when shared values and vision about distance education exists among the faculty, including a commonly held set of standards and assumptions about how to achieve effective teaching and learning at a distance. The policy structure of the university—including faculty reward and tenure policies—is critical to helping create and sustain such an environment. Also, faculty must have access to support personnel, including instructional designers, and computer and other media specialists, to facilitate experimentation, awareness, and adoption of distance education.

The 1996 Innovations in Distance Education Policy Symposium focused on faculty issues. The symposium was again organized according to the three functional areas for policy development: resource allocations, rules and regulations, and institutional accountability. Under each functional category heading below, a policy issue is listed. It is followed by a model policy statement to address that issue. Finally, a discussion that led to the model policy statement is summarized.

Resource Allocation

Policy Issue #1: Faculty Support Systems

Support systems are needed to aid faculty members as they shift toward the use of technology for distance education and to provide them with opportunities to explore distance education options and opportunities.

Model Policy Statement #1:

The institution should assume responsibility for ensuring that essential support systems needed for distance education are provided to the faculty. Such support will enable faculty members to develop curricula and use multiple delivery modes that both meet the varying needs of distance learners and support the strategic goals of the institution.

Summary of Discussion Resulting in Model Policy Statement #1:

- **Components of a comprehensive support system for faculty**

A prerequisite for policy development in support of faculty participation in distance education is the need to determine the components of a comprehensive support system for faculty. Symposium participants identified the following:

- ÆProfessional development for faculty;
- ÆInstructional design support;
- ÆDevelopment and production of educational support materials;
- ÆManagement of course logistics including materials delivery, staff support, registration, lesson handling, access to facilities, technical support;
- ÆTechnology facilities/infrastructure.

- **A different role for faculty in the new paradigm**

A second prerequisite for policy development in support of faculty participation in distance education is the need to define the roles faculty take on when they participate in distance education. For example, a tenet of distance education is that faculty make explicit how they will address the needs of learners as they design their courses. Symposium participants agreed that ideally this practice should underlie all education planning. However, it is even more urgent in the distance education environment. Unlike classroom instruction, the development of distance education is often a team effort. Therefore, faculty may find themselves in the role of “team member” and content expert in the instructional design process. Instructional designers, who often represent the learner’s perspective in team discussions of distance education design, typically begin by identifying learning objectives.

- **Rethinking resource allocation policies**

Because technology is changing so rapidly, institutions should avoid developing policy in terms of one or more specific technologies. Rather, various technology options should be considered as a set of tools from which to choose, not the driving force for decisions about distance education.

- **Resource allocation for development of effective instruction**

Some symposium participants argued that distance education requires more resources than classroom instruction. However, at least one person said that is an unexamined assumption.

Because distance education is a new, developing area, it is necessary to be more specific about the allocation of resources for distance education than may eventually be necessary. At this time, there is a need for conscientious attention to allocation of adequate resources which, in turn, may influence faculty

participation in distance education. The model policy statement was written to reflect a transitional phase in the evolution of distance education.

There also are those who argue that allocating resources for development of instruction via distance technology ultimately will improve education in both traditional and nontraditional settings. When distance education is ineffective, it often is because instructors have not adapted to the new environment. Well-designed distance education typically requires individualized instruction that is learner-centered and enables learners to work at their own pace. While learner-centered instruction is not unique to distance education, it has received increased attention as an outgrowth of the new distance education paradigm.

Policy Issue #2: Faculty Rewards

Decisions must be made about whether and how to reward the “extra” work required to develop technology-delivered courses.

Model Policy Statement #2:

The institution should be creative in using incentives and funding to encourage faculty development efforts using multiple delivery modes. This implies the need to recognize that development and delivery of instruction are two separate but equally important tasks and should be recognized and rewarded as such.

Summary of Discussion Resulting in Model Policy Statement #2:

- **Recognition that “quality instruction takes time” to develop**
Institutions that develop policy in support of faculty participation in distance education need to factor in the recognition—and funding—that reflects the considerable time it takes to design, develop, and implement quality instruction. Faculty also must adjust their expectations and recognize that participation in distance education will mean an additional time commitment beyond that usually required to prepare resident instruction.

Extra time often means extra expense. At a time when some institutions are not able to provide supplemental funding for special initiatives, distance education projects need additional funding. However, while distance education may cost more and require additional resources, monies required often do not come from the same funding sources as does support for traditional teaching. Cross-institutional collaborations, foundation grants, and corporate partnerships may be required to provide development funds, especially for smaller institutions.

- Investment in development of distance education courses**

The need to invest time in the development of courses is not unique to distance education; what is different is that knowledgeable faculty are understandably reluctant to enter the very public distance education arena without adequate preparation. If appropriately qualified faculty are hired specifically to teach distance education courses, they may not require extra compensation as long as preparation time is adequate. However, if faculty who were hired to teach resident instruction are not prepared for the demands of distance education, then adequate support and training to be successful should be provided by the institution. In such cases, extra compensation or release time may be appropriate during the transition for faculty who were prepared to operate only in the resident instruction paradigm. In the future, faculty will more likely bring skills to their jobs that will enable them to use new technologies more quickly and effectively.
- A defined “line” between development and instruction**

In resident instruction, the developer and the instructor are usually one and the same; course development simply is considered part of the job of teaching. In distance education, the developer is not necessarily the instructor. Even when the instructor is responsible for course development, support from instructional designers and technology specialists is likely to be needed. Regardless, the development phase of quality distance education is resource intensive.
- A new role for faculty**

In the past, faculty traditionally have exerted control over course content and directed learners to print materials and other resources they have chosen in advance. In distance education, faculty may no longer be the primary source of the course content for their students, i.e., they may not be the sole source of information about their field of expertise. In this new scenario, faculty would direct students to where content “resides” in a variety of distance education sources. This role of guide and facilitator is a new one for many faculty members. They must shift from serving as the primary source of course content to providing learners with access to that content; they also must shift from holding sole responsibility for course design, development, and delivery to sharing the responsibility for these tasks with an instructional support team. It is important to reorganize and prepare for the magnitude of this shift.

Policy Issue #3: Funding for Faculty Development

Resources must be acquired to fund faculty development for distance education.

Model Policy Statement #3:

The institution should simultaneously strive for adequacy and equity of funding and distribution of resources to support all viable courses and programs, not just a select few. Equity of funding and distribution of resources must be determined in accordance with preestablished criteria.

Summary of Discussion Resulting in Model Policy Statement #3:

- **Funding for developing faculty expertise institution-wide without neglecting the pursuit of excellence in strong programs**
One concern raised about “equitable funding” is that all programs may be leveled to mediocrity, because all initiatives will receive the same funding. Equitable funding, by definition, means fewer dollars for more programs, i.e., fewer dollars per program than if a select few were funded. Therefore, institutions need to establish criteria for the distribution of funding that will vary across institutional departments and according to the stage of development of the various distance education projects. An institution should utilize its strategic planning process to help establish these criteria.
- **Institutional support for faculty development**
Among the ways in which an institution’s support for faculty development can be demonstrated are policies governing sabbatical leaves, release time, and graduate assistantships. Faculty development needs related to distance education are legitimate and, therefore, should be factors in awarding these and other professional development opportunities.
- **Faculty members’ responsibility for their own development**
Faculty cannot rely entirely on their institutions to provide them with needed knowledge and skills in distance education. While they can look to the institution for assistance, professional development must be a shared responsibility between faculty members and their institutions. For example, grant writing to seek funds in support of training and/or the development of distance education initiatives can be done collaboratively.

Policy Issue #4: Managing Faculty Expectations

Faculty expectations regarding participation in distance education must be understood, considered, and managed. This is especially so because institutions differ in their reward structures for teaching via distance technologies.

Model Policy Statement #4:

Institutions should allow departments and/or colleges maximum flexibility with regard to reward structures to encourage innovative and timely participation in the institution's activities that support its distance education mission.

Summary of Discussion Resulting in Model Policy Statement #4:

- **Rewards tailored to faculty and departmental needs and preferences**
A college or department should utilize the full range of reward structures available, emphasizing those that are meaningful to their faculty. Just as different colleges compensate their faculty differently, so should they be free to vary their rewards for faculty contributing to distance education. Among institutional rewards to consider are these:

- ÆProviding a sabbatical;
- ÆProviding release time;
- ÆFunding participation in distance education conferences;
- ÆFunding graduate assistantships to support distance education projects;
- ÆIncreasing compensation;
- ÆRecognizing creativity, scholarship, and effective teaching at a distance in annual reviews;
- ÆSharing benefits of intellectual property rights;
- ÆProviding upgraded equipment;
- ÆOffering travel opportunities;
- ÆRecognizing a "quality instructor" in university publications;
- ÆSharing revenue;
- ÆSupporting research or teaching assistance to compensate for course development time.

Rules and Regulations

Policy Issue #5: Intellectual Property Rights

The institution's interest in and rights to the intellectual property generated by distance education initiatives must be addressed.

Note: Consensus was not reached on the granting of copyrights and royalties for faculty or staff. As a result, symposium participants wrote two model policy statements (5A and 5B). Distance education course materials could be developed under either model. The issue to be resolved is whether or not the institution has specifically commissioned the product as something above and beyond a faculty member's normal workload.

Model Policy Statement #5A:

Where significant institutional resources are involved, intellectual property rights for the development of electronic teaching materials should be shared by the faculty (and possibly members of the instructional design team), and the institution in relation to resources expended.

Model Policy Statement #5B:

Ownership of intellectual property should be determined by the *purpose* for which the materials are intended. Instructional materials produced specifically for a course are owned by the institution and shared with the individual faculty; royalty negotiations should be included in any intellectual property agreement.

Summary of Discussion Resulting in Model Policy Statements #5A and #5B:

- **Intellectual property rights as faculty incentives**
Institutions must consider the differences between faculty members' and administrators' perspectives on the issue of intellectual property rights. Although the institution may own the copyright, the faculty member still owns the content. Thus, a faculty member may feel justified in negotiating for a share of any royalties. Administrators, on the other hand, may feel pressure to use copyright negotiations as an incentive to get faculty involved in distance education. Implicit in both views is that distance education has revenue-producing potential beyond that of a resident instruction course.
- **Existing copyright rules and regulations**
Institutions already have rules "on the books" about intellectual property rights. Although most institutions own the intellectual property of the faculty, most strive for equitable treatment in sharing property with the creator. Policies considering intellectual property have been drawn from patent and copyright agreements. What is needed is clarification about their application to electronic media. The unique integration of technological support and collaborative design efforts makes such analogies problematic. At the very least, faculty and staff need to be made aware of what the existing copyright rules are.
- **The role of technical support staff in copyright issues**
Although in most institutions, the college or university "owns" the intellectual property of the faculty, the old rules may break down because of the roles of technical support staff. These staff members participating in the development of distance education must possess considerable expertise and creativity to be effective. Some argue that the support and production specialists deserve recognition and compensation through a share in royalties. Others argue that

instructional design expertise is for purchase, like other commodities or skills that contribute to the production of a product that will be copyrighted, and should not result in royalties for staff. This is an issue that undoubtedly will receive increasing attention as more courses for delivery at a distance are developed by teams.

Policy Issue #6: Quality Standards and Evaluation for Promotion and Tenure

Quality standards of distance education instruction that guide evaluation for promotion and tenure purposes need to be determined.

Model Policy Statement #6:

The quality of distance education should be held to the same standards as those governing on-campus education, although the instruments or methods used for evaluation may be different.

Summary of Discussion Resulting in Model Policy Statement #6:

- **Evaluation of distance education and instruction**
Currently the evaluation of distance education instruction for promotion and tenure is problematic. One reason is because teaching at a distance is often dependent on instructional support teams rather than on the instructor's individual performance. Also, confirming evidence of the quality of distance education ordinarily would be by peer review, but peers may not be familiar with the requirements of distance education design and development. For these reasons symposium participants suggested that distance education be evaluated at the departmental level rather than by individual faculty members.
- **Impact of technology on evaluation versus issues of learning outcomes**
Rightly or wrongly, the delivery medium often influences the evaluation of a distance education offering. For example, the quality of interactive compressed video used in a distance education course may affect student and other faculty perceptions of the quality of the distance education course itself. Some believe that there is need for uniform standards in judging courses—all courses— independent of the medium. One way to do that is to evaluate whether or not learning objectives were achieved.

Accountability

Note: Several accountability issues were considered together rather than individually as was done in the discussions of the policy issues in the other two functional areas of resource allocation and rules and regulations. Consequently, this section is organized

somewhat differently to reflect those discussions and to incorporate several accountability issues.

Policy Issue #7: The Relevance of Distance Education in Higher Education

The relevance or “fit” of distance education at various levels within higher education must be determined at the institutional level, the academic department level, and the individual faculty level.

Model Policy Statement #7:

Schools or departments should only offer distance education degrees or certificate programs when an audience of potential participants has been identified that is of sufficient magnitude to justify the resources necessary to support faculty and institutional efforts, and a credible curriculum has been developed.

Summary of Discussion Resulting in Model Policy Statement #7:

A focus on the institutional level of accountability:

- **Considerations for writing policy at the institutional level**

First, the articulation of accountability must flow from and support an institution’s stated mission and goals. For example, Penn State, under President Graham Spanier, has made a commitment to becoming the leading university in the integration of teaching, research, and outreach.

Second, policy related to accountability should focus on providing support for distance education, not on restricting its integration into the mainstream of institutional activity. However, when resident instruction has been the primary educational activity of an institution, there are major implications to consider when writing policy. Among such issues identified by symposia participants were:

- ÆThe role of the faculty senate in determining how to integrate distance education into the overall curriculum;
- ÆA demonstrated need for institutions to transform themselves to meet the needs of today’s students;
- ÆImplications of collaboration with business;
- ÆA desire to generate income by expanding the institution’s market;
- ÆProviding faculty with opportunities for rewards, recognition, research, interns, and faculty exchange programs through distance education;
- ÆA need to match distance education’s “fit” with individual disciplines;

- ÆA need for coordination with a larger organization (e.g., if an institution is part of a larger group of institutions that dictates/influences policy);
- ÆA need for coordination with the faculty union, if there is one;
- ÆA need for institutional policies to be linked to departmental policies, processes, and practices;
- ÆArticulation of the institution's responsibility to a defined audience (for example, local constituencies versus a worldwide audience).

For the institution that sets a goal of establishing faculty accountability for development and delivery of distance education, there are multiple factors to consider when writing policy. These include:

- ÆThe institution's funding status (public or private);
- ÆThe size of the institution;
- ÆThe affiliation of faculty (union or nonunion);
- ÆThe reporting/accountability paths for distance education (e.g., does accountability for distance education fall within the same reporting path as other teaching or research activities?).

Addressing the previously listed factors and others not yet identified is a considerable challenge. Policy related to faculty accountability should address the following:

- Æpromotion and tenure;
- Æoverall evaluation process;
- Æacknowledgment of individual effort;
- Æmaintaining quality standards, such as rigorous criteria for curriculum development, individual course and program development processes, and peer review standards;
- Æresource generation and distribution, including a definition of how to count students and fees;
- Æworkload definition;
- Æresources, grants, and release time to develop an institution's capabilities;
- Æa link to curriculum approval.

A focus on the departmental level of accountability:

- **Policy issues at the departmental level of accountability**

Colleges and/or departments should determine whether they have a good fit with distance education; that is, where subject matter is most easily adaptable to distance education and where there is the greatest market demand. The institution may have to decide whether to exclude certain colleges and/or departments from participation in distance education so that courses with the

greatest potential to be financially viable obtain the needed resources for development.

A structure must be created in which it is to the department's advantage to participate in distance education. Among the ways this can be achieved is through the provision of:

- ÆEnhanced visibility;
- ÆA base level of support for special distance education projects;
- ÆAn equitable distribution plan for tuition revenue and credit/instructional unit allocation;
- ÆRecognition and rewards for the effort and time commitment that is required to develop and deliver distance education.

It is also important to set up adequate resource allocation and support services for faculty. For example, a department could provide a teaching or research assistant to the faculty member during development or initial delivery of a distance education course to help with the temporarily increased workload.

Assistance should be made available to help departments recognize the demand for distance education among external audiences. Likewise, it should support a department's market-based decision to develop curricula for distance delivery that brings needed education and training to identified external audiences. However, an institution must recognize that some departmental programs already have as many students as they can support and therefore may not be prepared to extend programs beyond institutional boundaries without adding faculty.

Although distance education "may not be for everyone," an institution should provide leadership to ensure that distance education is considered as a legitimate vehicle of delivery. This requires providing appropriate status and compensation to faculty who participate. One consideration is whether to use tenure-track faculty, as opposed to "adjunct" faculty, for evening, weekend, and distance teaching.

- **Other departmental accountability issues for consideration**

A number of other considerations were identified by the symposium participants. Among them were:

- ÆHow to cost out technological resources, such as new library technology;
- ÆHow to handle licensing agreements to cover distant students' access;
- ÆHow to arrange for access to computer labs and other special services for off campus students;

- ÆHow to provide a complete curriculum at a distance;
- ÆHow to share resources when creating interdepartmental partnerships (for example, how to distribute costs and credits/units among multiple departments).

A focus on the individual level of accountability:

- **Individual accountability at the faculty level**

Since providing distance education often involves developing new instructional materials, faculty accountability should focus, in part, on issues surrounding the development of these materials. One related issue is how to measure productivity and assess faculty competence in the development of distance education materials. Traditionally, accountability has been assured through peer review. However, distance education is changing so rapidly that academic peers may not feel competent in evaluating a colleague's work as a distance educator in a given content area. Institutions and/or departments should consider supplementary avenues or alternatives to the traditional peer review process.

Another set of issues arises when faculty are members of a union. For institutions in which there is a faculty union, changing the terms and conditions of faculty performance probably means renegotiating a contract. One recommendation to these institutions is to focus on rewards and incentives for participation in distance education rather than on changing job descriptions or mandating new criteria for future hires only. The Pennsylvania State System of Higher Education has recently negotiated such an arrangement.

Institutions must define expectations regarding individual faculty performance in distance modalities in a manner similar to that done for residence instruction. For example, in resident instruction there are certain "baseline" expectations, e.g., faculty are expected to show up for class, to be prepared for class, and to grade papers and exams in a timely manner. These basic aspects of teaching may translate differently into the distance education environment. In distance education, a faculty member may be expected to answer e-mail messages from students in a reasonable amount of time. On the other hand, certain underlying principles (such as showing support and respect to students) and certain activities (such as reasonable turnaround time for returning lessons) transcend instructional delivery methods.

Another overlap between expectations in resident instruction and distance education pertain to faculty expertise in the use of technology. Faculty may be expected to learn to use technology such as an overhead projector, in the classroom, and to move beyond "chalk and blackboard." Likewise, it is not unreasonable to expect faculty to learn to use technology for teaching at a

distance. Increasingly, today's students are familiar and comfortable with technology, and they expect faculty to be knowledgeable and capable of using instructional technology as well.

- **Learners roles and responsibilities**

Learners too have responsibilities when they participate in distance education courses. They can and should be held accountable for taking an active part in their own learning. Well designed distance education can provide a model of active participation by the learner and can serve as a catalyst for transforming learning from a passive to an active process.

Conclusion

Three important issues emerged from the second symposium about developing institutional policy in higher education that supports faculty participation in distance education.

First is the issue of control. Because of the team environment in which distance education is developed and delivered, some faculty are concerned about “losing control” both of their course content and of the learning environment in which they present it. These faculty may fear that their role as teacher will be diminished if they do not maintain control over the learning process itself, or that if they give students a significant amount of responsibility for shaping their own learning.

There is also the sense of loss experienced by some faculty when working in a team environment. Shared authority at the course level is a new idea for many. Faculty question how they can be evaluated as individuals when they do not have total control over their “product.” Both aspects of “loss of control” lead to issues of accountability for faculty that institutions must resolve if distance education is to be successfully mainstreamed into higher education.

Second is the issue of the time required to develop quality distance education courses and the recognition that it also takes an increased amount of time and energy to teach at a distance. Because the nature of a faculty member's work may change when providing education at a distance, institutions must develop policy that assigns, evaluates, and rewards faculty accordingly.

Third is the blurring of the distinction between resident instruction and distance education. Distance education has the potential to serve as a catalyst for creating more active learning environments across delivery modes. This transformation has implications for accountability and regulatory policy, both in the classroom and at a distance.

Finally, faculty and administrators involved in distance education must take responsibility for continuing to ask questions such as these: “What is distance education?” “Where do we want it to take us in the future?” “Will it continue to have its own identity?” Distance education may, in fact, be a label for change rather than a methodology that will have a separate identity from other ways of providing education. Participants at the 1996 symposium, like those who attended in 1995, continue to emphasize that integration of distance education into the mainstream of higher education is a more desirable goal than having it evolve as a separate but equal (or unequal) entity.

Advocates of distance education must position their institutions for the future and help write policy that makes it possible for faculty to participate in distance education with confidence. There must be stability, as well as flexibility, in the distance education environment if proponents of distance education are to create comprehensive systems that meet the needs of the rapidly changing learning environment in higher education.

Symposium 3: Policy in Support of the Distance Learner

Participating institutions agreed that the May 1998 policy symposium should focus on policy issues affecting the distance learner, complementing the previous symposia on administrative and faculty issues. A keynote address by M. Lee Upcraft, Assistant Vice President Emeritus for Student Affairs, Professor Emeritus in the College of Education, and a Research Associate with the Center for the Study of Higher Education, at Penn State, laid the foundation for the participants' policy discussions. Upcraft noted that personal experiences, including work, family, and friends, may take the place of the social aspects of campus life for adult and distance learners. He raised the following questions about the "student experience" of distance learners and challenged participants to address them:

- How inclusive are the learning outcomes of distance education? Is distance education only about outcomes that have to do with cognitive development? Prospective employers want graduates with interpersonal and social skills as well as those who have mastered content.
- Who is the distance learner? Institutions have to look at race, ethnicity, and economic status of distance learners. Equal access is important. Will the have-nots be served or left behind?
- How is learning affected when we remove face-to-face interaction? Upcraft said he finds it "ironic that many faculty who decry the real or imagined impersonalization that supposedly attends technology are often the same faculty who accept the necessity of lecturing to 900 students at one time in a large lecture hall."
- What impact, if any, do the out-of-class experiences of distance education have on students' learning? This includes interaction with the distance learner's family, co-worker, and friends.
- What support services should institutions offer distance education students, and how will these services be delivered? What should these services include? personal counseling? career counseling? health services? placement services? services for special populations and the disabled? services for students making a transition from their current environment?
- Who will ensure the integrity of a distance education degree? Various institutions and corporations are offering courses at a distance; students could conceivably accumulate courses from a variety of places taken at different times and then "shop around" for an institution to give them a degree. Is this a desirable outcome of distance education?
- What is the role of students in institutional governance, policy, and practice? "In the traditional models, we involve students; we don't give them control usually,

but we listen to what they say, we think they're a valuable resource," Upcraft said. How can this be accomplished with students at a distance?

- What responsibility, if any, do institutions assume for the conduct of students at a distance? Most institutions have codes of conduct. Will distance education students be held to the same standards as resident students?

In concluding his presentation, Upcraft said, "I think we must be certain, through extensive assessment and research, that the outcomes we value are at least as attainable through distance education and technology as through our traditional delivery systems. One would hope we could do better, and improve upon the achievement of learning outcomes through distance education."

In small-group discussions that followed, the participants addressed the issues identified in the Delphi process as well as those raised by Upcraft through consideration of the symposium's three major topics: learner participation, curriculum development, and support services. What follows is a summary, by topic, of the policy issues considered, model policy statements developed to address each issue, and discussion points that led to the model policy statements.

Learner Participation

Policy Issue #1: Technical Support Services

Distance education requires a rethinking of support services available to students so that they can successfully participate.

Model Policy Statement #1:

Institutions engaged in distance education should provide students with technical support services required to enroll, learn, communicate about, and complete their course of study.

Summary of Discussion

- **Course design and media**

In designing their courses, instructors need to choose instructional media tools carefully, with an awareness that learners may have limited access to resources or have special needs. Understanding the preparations needed for supporting learners at a distant site is also crucial. And faculty must be able to incorporate technologies as they create effective learning strategies that support learning goals and objectives.

- **Preparation and technical support**

Before enrolling in a distance education course, students need explicit information about the technology required, as well as convenient access to hardware and software. It is not necessarily the institution's responsibility to provide computers and other tools to individual distance learners, however. Once enrolled, some students may need instructions on how to manage the required software; e.g., how to attach a document to an e-mail message. Because of their location and their other responsibilities, they also may need access to technical support around the clock to minimize the frustrations and time differences across time zones when dealing with equipment breakdowns and related problems. One approach to ensuring adequate technical support would be the development of a set of "best practices," based on WICHE (Western Institutional Consortium of Higher Education), IMS (Instructional Management System), or other models already in place.

Policy Issue #2: Access to Learning Resources

Knowing that some resources may not be as readily available to distance education students as to those in residence, there is a need to review assumptions about how to make information resources available and what resources to make available. There is the need to be creative and also clear about what's really necessary to successfully complete a course—as differentiated from what might be desirable.

Model Policy Statement #2:

Institutions offering distance education courses should have established practices to provide timely access to the learning resources and experiences required to complete program requirements and meet course objectives.

Summary of Discussion

- **Access and support**

Access to the resources and experiences of higher education includes not only those leading to knowledge acquisition and the mastery of certain skills but also to interpersonal communication and social interaction; i.e., the *affective* component of a learning environment. Although the latter may not be as critical an issue for mature adult learners as for younger students, distance learners, as well as resident students, may need access to interactions with other learners for such purposes as exchanging ideas or working collaboratively, even if this doesn't take place face-to-face.

- **Collaboration to provide resources**

In providing access to resources, cost can be a major consideration. To narrow the gap between the “haves” and “have-nots,” for example, libraries of different institutions offering distance education could cooperate to share documents and other resources. Institutions could develop a list of where resources can be found and share that list with one another.

Another possibility mentioned is limiting distance education sites to areas where resources are conveniently located. In some cases, community colleges located near the distance learner might provide library materials and other resources. Faculty also may want to consider use of alternative resources when designing a curriculum. For example, community-based resources might substitute for campus-based equivalents such as laboratories. In proposing these solutions, symposium participants also raised the question of whether a policy on providing access to resources could be legally binding. If an institution promises resources but doesn’t deliver, could it be held liable?

Policy Issue #3: Evaluation of the Learner’s Experience

Distance education learners should be provided the opportunity to evaluate the learning experience.

Model Policy Statement #3:

The learner evaluation process should include separate assessments by learners of the effectiveness of various components of the distance education delivery system. These might include course content vis-Övis course objectives, the learning experience itself, the instructors’ knowledge and presentation, and the technologies used to deliver the course. As is true for resident instruction, care must be taken to maintain learners’ confidentiality.

Summary of Discussion

- **Influence of technology and technical support**

There is a recognition that technology, and how well it functions, may influence a distance learner’s assessment of the quality of instruction. Because of that influence, and faculty’s possible concerns about it, symposium participants said they would like to see evaluation of the instructor and evaluation of the delivery mode treated separately, if possible. This concern underscores the need for technical support. Perhaps the quality of this support should also be evaluated.

- **Improving presentation skills**

The reality is that some instructors are more effective than others at communicating via technology. These performance issues can affect learning at a distance, especially when visual media such as interactive compressed video or streaming video are used. Institutions could turn this challenge into an opportunity for faculty to improve their presentation skills.

- **Maintaining confidentiality**

There also are concerns about protecting confidentiality, particularly when utilizing the Internet for gathering evaluation data from learners. Steps can and must be taken to do so.

Policy Issue #4: Evaluation of Student Performance

Institutions need to develop meaningful evaluation tools and methods linked to learning objectives.

Model Policy Statement #4:

The assessment of student performance should be consistent with instructional objectives and reasonably convenient to the distance learner while assuring the integrity of the process.

Summary of Discussion

- **Developing effective assessment and interaction techniques**

Objective assessment of how well students learn at a distance can be a challenge. Distance educators should consider a wide array of assessment techniques, among them objective examinations, essays, and skill-based exercises. Automated scoring could be used in some cases. Class participation, a common component of assessment in resident instruction, is different for learners at a distance and must be measured differently. Interaction strategies should be developed, acknowledging that the powerful component of non-verbal communication is removed when learning takes place at a distance using nonvisual media.

Accrediting and licensing agencies may require practicums in some disciplines. And in some clinical situations, there are restrictions on advising across state lines for disciplines in which licensing or certification is involved. All of these profession or state-regulated mandates must be taken into account as well.

To maintain the integrity of examinations, proctors may be needed at off-campus sites. Arrangements for providing proctors presents another challenge, but not an insurmountable one.

Curriculum Development

Policy Issue #5: Incentives

Change in the academic culture may be required to recognize and incorporate distance education as part of each department's mission and the expected workload for faculty.

Model Policy Statement #5a:

Institutions should develop creative incentives that motivate departments to modify/develop new distance education curricula in order to serve new audiences.

Model Policy Statement #5b:

Academic units should have access to the resources needed to support development and delivery of distance education programs as part of the regular workload of faculty.

Model Policy Statement #5c:

Academic units should have full ownership of, and responsibility for, the academic quality of distance education programs.

Summary of Discussion

- **Commitment to ensuring quality programs**
Historically, distance education has had a peripheral role within higher education institutions. Distance education administrators are working not only to persuade their universities and colleges to make policy and resource commitments to this mode of learning, but also to have institutions recognize the value of distance education and define it broadly as programs, not simply as individual courses. Institutions cannot claim a commitment to academic "quality" without a similar commitment to the way in which such programs are administered.
- **Faculty compensation and incentives**
In order to attract high quality instructors when involvement in distance education is not considered part of the regular load, faculty compensation must

be addressed. Distance education must be linked to promotion and tenure as an incentive to make participation more attractive for faculty who are already fully committed to other activities. Other models to consider are to buy out faculty time to develop and teach distance education courses and return revenue to the department, as a new revenue stream for the academic unit, or to hire separate faculty to teach distance education courses. While distance education can provide an intrinsic motivation for faculty to innovate, pragmatic incentives such as financial rewards cannot be ignored.

- **Similarities and differences in distance and resident learning**

It is important to recognize that there are similarities, as well as differences, between the needs and the expectations of traditional resident students and nontraditional distance learners. For example, there might well be face-to-face components of classroom instruction that can be easily modified for distance education programs. However, an important difference to note is that new learners reached via distance technology may be seeking education to meet real-life challenges and not be interested in or patient with too much “ivory-tower” theory.

- **Industrial/professional partnerships**

Distance education administrators should encourage partnerships both with the private sector and across institutions of higher education. It should also be recognized that some types of professional schools (e.g., business, engineering, social work, nursing) may be more attractive to adult learners than others (e.g., liberal arts). One approach is to consider new kinds of interdisciplinary programs (for example, training English majors to write for corporations or to develop Web sites) and applied programs (e.g., writing institutes or professional certificate programs).

Policy Issue #6: Quality in Marketing and Mission

Two related issues participants considered were:

- a. How institutions can ensure that distance education offerings are of the same quality as resident instruction and are perceived as such; and
- b. How institutions can ensure that their distance education offerings are consistent with their mission while also meeting the demands of the marketplace.

Model Policy Statement #6a:

Academic departments and administrative units should incorporate plans and criteria for development of distance education offerings into their strategic plans consistent with their mission, institutional strengths, and target audiences. Processes for appropriate program approval should be developed.

Model Policy Statement #6b:

An institution's program units should make regular contact with external stakeholders to ensure that programs meet market needs as well as an institutional mission.

Summary of Discussion

- **Balancing mission and response**

A concern of distance education administrators is that distance education programs may be driven by external customer needs rather than the mission and internal strengths of their institutions. There is a perception that because distance education units are often self-supporting, they are motivated primarily by generating revenue and the quality of programs suffers as a result, i.e., that this delivery method is inferior to resident instruction. A related concern is that unrealistic internal expectations may push distance education programs to target inappropriate audiences. Therefore, one challenge is that institutions must find a balance between internal and external forces when identifying appropriate distance education opportunities.

A second challenge is that faculty may not be well positioned to meet the needs of industry and other employers, especially if there is a conflict between desires for "education" and "training." Participants proposed that institutions should conduct needs assessments, and based on the results, make one of three choices: do nothing differently, do what the customers (employers, distance learners) suggest, or provide a combination of these two approaches. For example, an institution could choose to have a dual mission in which certain elements embedded in distance education courses developed are adapted to meet the needs of specific audiences. In general, more emphasis on needs assessment and market research is needed before undertaking distance education targeted at non-traditional learners.

Policy Issue #7: Technology-Enhanced, Learner-Centered Program Development

The issues considered under this topic were:

- a. How to structure the learning environment and use distance education technologies to incorporate emerging teaching and learning strategies (e.g., active, asynchronous, collaborative, inquiry-based, and resource-based learning);
- b. How to define, articulate and/or enforce legal and ethical standards related to copyright, intellectual property rights, protected access, and common courtesy associated with the new technologies.

Model Policy Statement #7a:

Institutions should empower academic units to expand the definition of the instructional experience to incorporate emerging strategies for teaching and learning.

Model Policy Statement #7b:

Academic units should develop program standards for the assessment of student performance based on the fulfillment of learning objectives regardless of the delivery mechanism.

Model Policy Statement #7c:

Institutions should define standards for, and provide resources for, upholding ethical and legal practices regarding copyright, intellectual property rights and responsibilities, licensing, and common courtesy for digital communication. These should be applicable to both students and faculty.

Summary of Discussion

- **Developing effective measurement tools**

Under most existing institutional policies, course credits are tied to measurements that include “contact hours,” number of weeks, and often length of class sessions. Other issues that drive curriculum and pedagogical decisions include faculty workloads, grading, and examination policies. Processes for changing evaluation methods in this structured academic environment are usually perceived as complex and, therefore, thwart change. To operate effectively in a distance education environment, institutions can start by defining courses and programs by goals and outcomes, *not* by delivery methods or by resident instruction policies. Also, more faculty development

should be provided on teaching strategies—many of which are applicable to resident instruction—instead of simply providing training in use of technology. End-of-course evaluations can be applicable across all delivery methods/systems and should be based on current “best practices.”

Support Systems and Services

Policy Issue #8: Support for those Engaged in Distance Education

This topic covers appropriate support for faculty authors and instructors, support staff, and learners in the following areas:

- Academic advising;
- Problem-solving related to nonacademic support;
- Pedagogy (teaching and learning skills);
- Technology (access and skills acquisition);
- Administrative systems (e.g., registration, record keeping, financial aid, admissions, intellectual property, promotion, and tenure).

Unlike the series of policy issues and statements considered previously, all of these components were addressed in one extended policy statement.

Model Policy Statement #8:

In order to create an effective distance education environment, the institution should establish congruence between the provider and the learner regarding access to information, resources, and skill development. In this context congruence means that both providers and learners involved in distance education must come together in such a way that learning goals can be accomplished. It is the responsibility of the institution to determine faculty, staff, and learner needs that directly affect their ability to successfully participate and provide for ways to address those needs. To accomplish this goal, the institution should:

- Provide an organizational structure that is responsive to and responsible for the support needs of faculty authors/instructors, support staff, and the distance education learner.
- Use strategic resource planning to provide for the ongoing support needs of distance education systems, including but not limited to technology, staffing, and curriculum issues; this could include collaborative efforts among institutions.
- Establish and communicate explicit behavior, role, and performance expectations to all participants engaged in distance education.

- Provide appropriate levels of training and orientation for all participants engaged in distance education.

Summary of Discussion

- **Domains of responsibility**

Institutions need to define domains of responsibility for technology and training. Specificity is important when developing curricula/instruction targeted to each group (for example, differential technology training targeted to faculty, staff, and students). How does a university balance and meet expectations? How high should the technology bar be set?

Potential barriers may include:

- ÆLack of resources;
- ÆLack of access, or desire, to use technology;
- ÆDiffering expectations and comfort levels within the communities to be served.

- **Access and technical compatibility**

There are both access and compatibility problems to consider. A real disparity may exist between technological resources available to resident students and those available to learners at a distance. These may include platform-specific capabilities and access to various delivery systems. As noted previously, distance learners may need technical support across time zones.

Faculty, too, may be at a disadvantage in a distance education environment. Not all faculty authors/instructors have convenient access to technology. Moreover, expectations of faculty performance in distance education activities may not be articulated in such a way that performance can be easily measured. This issue dovetails with issues previously raised regarding the faculty rewards structure and cultural changes within higher education that distance education requires.

To address these challenges, institutions should ensure compatibility between providers and learners regarding technology platforms used, resources required, instructional design models implemented, and support systems developed. Before doing so it is important to understand who the distance learner is and to which resources they have access (possibly by using market research to develop an audience profile).

Conclusion

Major Symposium Themes

Three major themes related to learners at a distance emerged during the third symposium. They were defining and reaching learners, providing access to learning resources, and maintaining and assessing quality.

One question that participants repeatedly raised was how to define and reach prospective distance learners, particularly those in traditionally underserved populations. There was agreement that educators need to expand their scope to reach populations that may lack access to higher education. It also was noted that distance education has reached acceptance to the point that it is increasingly an option chosen by students on campus, not only those who reside elsewhere.

Access to resources, including technology and library materials, was a second important theme that pervaded the symposium. Participants suggested that awareness of possible resource limitations should be built into curriculum design, and students should be informed in advance of technologies required. Institutions may need to collaborate to provide access to these resources as well as to provide around-the-clock technical support for both students and faculty if “anytime, anyplace” learning is to become a reality.

Finally, quality of programs, and assessment of this quality, emerged as a major concern. Symposium participants discussed the need for development of more effective ways to measure students’ performance and ensure quality of their overall distance education programs.

Closing Presentation

A presentation by Michael B. Goldstein, member of the law firm Dow, Lohnes & Albertson and practice leader of its Educational Institutions Group, provided a fitting conclusion to the third policy symposium. He addressed the issue of students’ rights and responsibilities in distance learning.

Mr. Goldstein began by reminding participants that “All regulation of education is intended to protect the interests of the student as well as the interests of the broader public.” He compared developments in education to the airline industry, “Like the airline industry, higher education was regulated to make sure that there were few crashes, that a person got on and off at a particular place (e.g., received a creditable bachelor’s degree) . . . But, in the final analysis, does the degree mean anything other than surviving the flight?”

Goldstein noted that the nature of higher education has changed, and, to a large extent, the driving force is technology. He also noted that it is important that educators “repeatedly focus on what the learner needs and wants, not what the institution finds convenient to provide.”

He outlined the rights of learners in what he terms the age of telecommunicated learning:

- The right to know that courses meet high qualitative standards so that both the learners and the public can rely on their education.
- The learner’s right to choose a style and method of learning that works best for that person—not only what to learn, but also where, when, and how.

Goldstein said the learner’s right of choice should not depend on his/her financial status or where he or she happens to live. Also, he noted that the law requires accommodation for those with disabilities. “Technology solves some problems but creates others” for students with special needs. “When we talk about student services and student rights,” he said, “we have to think about those learners whose access to the kind of technology of which we boast is denied because we’re not giving them the resources to access that technology.”

“The learner has a right to be properly served, not just in the delivery of courseware but in the range of services that make higher education more than just pouring information into a vacant skull. Counseling, advising, and interaction with peers and faculty are all important parts of intellectual growth. One can argue that the spatial separation makes it even more important that there is an affirmative effort to reach out to students and give them the wrap-around kind of support which is so important to the learning experience.”

Goldstein concluded that it is important to match student services with needs, and that higher education today has to learn how to serve a much broader, highly differentiated student body. “We can’t allow ourselves to fall prey to the trap laid by those who doubt the use of technology in learning—that somehow what we do is fundamentally different from ‘real’ education,” he said. It is important that distance learners not be viewed as second-class citizens of the higher education community, he added. “We can’t allow that to occur any more than we are willing to allow our institutions to be seen as inferior to the ‘real thing.’ We may use the term ‘virtual university,’ but we are every bit as much the real thing. There is nothing virtual about our learners. They are just as real.”

Following Goldstein’s exhortation, the symposium came to an end. But not before many of those who had participated in the three year series expressed their hope that a way could be found to continue this valuable forum. Much had been

accomplished, but much remains to be done if distance education is truly to be incorporated within the mainstream of higher education.

Appendix A

Strategies to Secure Institutional Commitment

Strategies to Secure Institutional Commitment

Policy symposia participants suggested a process through which institutions can most effectively review current policies and work toward the integration of distance education into the policy infrastructure:

- **Start with Mission**—Distance education must be seen as an integral part of the institutional mission. This must be articulated and communicated to the policy-making community of the institution, establishing the need for an integrated policy.
- **Define a Vision**—It is essential that there be a clearly articulated vision for the role that distance education will play within the institution’s mission. This creates a priority for resolving policy issues.
- **Establish Guiding Principles**—Broad principles such as those identified during the policy symposia create performance expectations for policies and policy makers.
- **Identify Policy Barriers**—It is important that the existing policy barriers be defined in terms of their specific implications for achieving the stated vision and meeting the expectations defined by the guiding principles.
- **Examine the Assumptions Behind Existing Policies**—Most policies were created for a reason, usually to solve a problem or to guarantee minimum standards of quality. The goal should be to respect the original assumptions, if still valid, but to broaden the scope of the policy to include distance education, as well as classroom-based instruction.
- **Identify and Involve the Policy Stewards**—Early in the process, identify the person or office within the institution that is most directly affected by a particular policy or that is responsible for its implementation. Involve these policy stewards throughout the process.

In many institutions of higher education, there will be resistance to integrating distance education into the mainstream of higher education. Proponents of distance education must be prepared to meet that resistance. Possible strategies to counter such resistance include the following:

1. Demonstrate the quality of emerging distance education methods and technologies.
2. Demonstrate higher enrollments and increased revenue, if applicable. Describe how this can occur without loss in the quality of instruction and learning when distance education methods and technology are used.
3. In discussions with administrators, use the broad concept of improved learning as a segue to discussions of distance education.
4. Build awareness among institutional decision-makers about what is happening with the implementation of distance education in the broader educational marketplace.
5. Establish faculty as agents for change by funding their special distance education projects.
6. Link faculty research interests to distance education delivery.
7. Build relationships with academic units and their leaders, not just with individual faculty.
8. Demonstrate how revenues can be shared among academic and administrative units and how target populations can supply a funding stream for distance education programs.
9. Build awareness about successful distance education initiatives through newsletters and other publications targeted to decision makers.
10. Establish relationships, individually or collectively, with faculty who have been leaders in distance education; let faculty be the advocates. Use listservs in a practical way to collaborate, share both experiences and expertise, communicate about technology updates, and provide technical support.

Appendix B

**Innovations in Distance Education
Policy Symposium
October 1–3, 1995
The Penn Stater Conference Center Hotel
University Park, Pennsylvania**

Participants

Elizabeth A. Barron
Assistant Vice President
Academic Affairs
Xavier University of Louisiana

Carl Berger
Director
University Information
Processes—Academic
University of Michigan

Patricia Book
Associate Vice President and Associate Dean
Continuing and Distance Education
The Pennsylvania State University

H. Jerry Carter
Program Manager
Education Programs
AT&T Foundation

Pauline E. Drake
Dean of Continuing Education
Spelman College

Margaret Geisler
Director of Continuing Education
The University of Wisconsin—Madison

Francine Jefferson
Director of Sponsored Programs
Cheyney University of Pennsylvania

Mary Jim Josephs
Assistant Vice Provost
for University Outreach
Michigan State University

Robert Kalal
Associate Director of
Academic Technology Services
The Ohio State University

June Kisch
Associate Professor
College of Education and Human
Services
Wright State University

Kathleen Krendl
Dean
School of Continuing Studies
Indiana University

William O. Lawton
Dean
College of Continuing Education
Hampton University

Ken Looney
Dean of Extended Education
Tennessee State University

Joe Mambretti
Director
Academic Computing Services
Networking Services and Information
The University of Chicago

Valorie McAlpin
Director of Agricultural Communications
North Carolina A&T State University

Gary Miller
Associate Vice President
for Distance Education
Continuing and Distance Education
The Pennsylvania State University

Harold A. Miller
Dean
Continuing Education and Extension
and University College
University of Minnesota

Judy Ozment
Associate Professor of Chemistry
The Pennsylvania State University

James Ratcliff
Director
Center for the Study of Higher Education
The Pennsylvania State University

Richard Rembold
Assistant Vice-President for
Academic Affairs
Coppin State College

James Ryan
Vice President and Dean
Continuing and Distance Education
The Pennsylvania State University

Steven F. Schomberg
Associate Vice-Chancellor and Director
Continuing Education and Public Service
University of Illinois at
Urbana–Champaign

Philip H. Swain
Director
Continuing Engineering Education
Purdue University

George E. Van Scoyoc
Associate Executive Vice President
for Academic Affairs
Purdue University

Emmett J. Vaughan
Dean
Division of Continuing Education
The University of Iowa

Richard C. Winchester
Vice President for Academic Affairs
Lincoln University

1995 Symposium Staff

Deborah Klevans
(Project Manager)
Associate Director
Office of Program Planning
Continuing and Distance Education
The Pennsylvania State University

Dehra Shafer
(Associate Project Manager)
Program Planner
Office of Program Planning
Continuing and Distance Education
The Pennsylvania State University

Andrea Pisani Babich
(Recorder)
Instructional Publications Designer
Department of Distance Education
Continuing and Distance Education
The Pennsylvania State University

Anita Colyer
(Recorder)
Instructional Publications Designer
Department of Distance Education
Continuing and Distance Education
The Pennsylvania State University

Roland Isnor
(Evaluator)
Senior Project Associate
American Center for the Study of Distance
Education
The Pennsylvania State University

Glenn Johnson
(Recorder)
Instructional Designer
Center for Academic Computing
The Pennsylvania State University

James Meyer
(Facilitator)
Coordinator of Decision Support Systems
Continuing and Distance Education
The Pennsylvania State University

Larry Ragan
(Facilitator)
Director
Instructional Design and Development
Department of Distance Education
Continuing and Distance Education
The Pennsylvania State University

Wayne Smutz
(Facilitator)
Director
Office of Program Planning
Continuing and Distance Education
The Pennsylvania State University

Gail Yaverbaum
(Recorder)
Associate Professor
Information Systems
The Capital College
The Pennsylvania State University

**Innovations in Distance Education
Policy Symposium
September 29–October 1, 1996
The Penn Stater Conference Center Hotel
University Park, Pennsylvania**

Participants

Steve Acker
Associate Professor and Associate
Director for Instructional Computing
The Ohio State University

Wayne Banwart
College of Agriculture, Consumer, and
Environmental Sciences
University of Illinois

Robert W. Batchellor
Extramural Programs
University of Illinois

Christopher Bise
Centennial Professor of Mining Engineering
The Pennsylvania State University

Robert L. Church
Assistant Vice Provost for
University Outreach
University of Michigan

Elaine Didier
Associate Dean
Rackham School of
Graduate Studies
University Of Michigan

Daniel Granger
Director of Distance Education
University of Minnesota

Ramu Kannan
Assistant Professor
Management Science and Economics
Coppin State College

George Klingler
Associate Dean
Continuing Education
The University of Iowa

William O. Lawton
Dean
College of Continuing Education
Hampton University

Kenneth Looney
Dean of Extended Education
Tennessee State University

Valorie McAlpin
Director of Agricultural Communications
North Carolina A&T State University

Carlen McLin
Director of Post Graduate Education
Xavier University of Louisiana

Henry S. Merrill
Associate Dean
School of Continuing Studies
Indiana University East

Gary Miller
Associate Vice President
for Continuing and Distance Education
The Pennsylvania State University

Harold A. Miller
Dean
Continuing Education and Extension
and University College
University of Minnesota

Egondu Onyejekwe
Director of Emerging Technologies
The Ohio State University

Richard Rembold
Assistant Vice President for Academic Affairs
Coppin State College

Ray Satterfield
Director
Telecommunications Center
Cheyney University of Pennsylvania

Miriam F. Simmons
Senior Outreach Specialist
The University of Wisconsin–Madison

Philip H. Swain
Director
Continuing Engineering Education
Purdue University

Judith A. W. Thomas
Professor and Chair of Education Department
Lincoln University

Evelyn Thomchick
Associate Professor
Business Logistics
The Pennsylvania State University

Carolyn Y. Woo
Associate Executive Vice President for
Academic Affairs
Purdue University

1996 Symposium Staff

Deborah Klevans
(Project Manager)
Associate Director
Office of Program Planning
Continuing and Distance Education
The Pennsylvania State University

Dehra Shafer
(Associate Project Manager)
Program Planner
Office of Program Planning
Continuing and Distance Education
The Pennsylvania State University

Andrea Pisani Babich
(Recorder)
Instructional Publications Designer
Department of Distance Education
Continuing and Distance Education
The Pennsylvania State University

Anita Colyer
(Recorder)
Instructional Publications Designer
Department of Distance Education
Continuing and Distance Education
The Pennsylvania State University

Roland Isnor
(Evaluator)
Senior Project Associate
American Center for the Study of
Distance Education
The Pennsylvania State University

Glenn Johnson
(Rapporteur)
Instructional Designer
Center for Academic Computing
The Pennsylvania State University

Kris Ito Lambert
(Recorder)
American Center for the Study of
Distance Education
The Pennsylvania State University

Fran Osseo-Asare
(Recorder)
Instructional Publications Designer
Department of Distance Education
Continuing and Distance Education
The Pennsylvania State University

Lenny Pollack
(Facilitator)
Manager
Human Resource Development
The Pennsylvania State University

Larry Ragan
(Rapporteur)
Director
Instructional Design and Development
Department of Distance Education
Continuing and Distance Education
The Pennsylvania State University

Karen Reichard
(Facilitator)
Human Resource Development Specialist
The Pennsylvania State University

Barbara Sherlock
(Facilitator)
Human Resource Development Specialist
The Pennsylvania State University

Wayne Smutz
(Moderator)
Director
Office of Program Planning
Continuing and Distance Education
The Pennsylvania State University

**Innovations in Distance Education
Policy Symposium
May 12–14, 1998
The Penn Stater Conference Center Hotel
University Park, Pennsylvania**

Participants

Steve Acker
Associate Professor
Associate Director for
Instructional Computing
University Technologies Services
The Ohio State University

Wayne Banwart
Assistant Dean
College of Agriculture, Consumer,
and Environmental Sciences
University of Illinois

Habtu Braha
Chair of Faculty Information
Technology Committee
Coppin State College

Dan Carchidi
Special Programs Coordinator
Academic Outreach
University of Michigan

Robert L. Church
Assistant Vice Provost for
University Outreach
Michigan State University

Elaine Didier
Interim Director
Academic Outreach
University of Michigan

Daniel Granger
Director of Distance Education
University College
University of Minnesota

Melvin N. Johnson
Associate Vice-Chancellor for
Academic Affairs/Technology and
Telecommunications
North Carolina A&T State University

Chad Kainz
Director of Instructional Technology
Networking Service and Information
Technologies
The University of Chicago

George Klingler
Associate Dean
Continuing Education
The University of Iowa

Kenneth Looney
Dean of Extended Education
Tennessee State University

Fred McCoy
Associate Professor of Education
Lincoln University

Roger Maclean
Director of Outreach
University of Wisconsin–Madison

Fred Mastny
Associate Head of Extramural
Programs
University of Illinois

Gary Miller
Associate Vice President
for Distance Education and
Executive Director, World Campus
The Pennsylvania State University

June Ovington (Kisch)
Associate Professor
College of Education and Human
Services
Wright State University

Richard Rembold
Assistant Vice President for
Academic Affairs
Coppin State College

Ray Satterfield
Director
Telecommunications Center
Cheyney University of Pennsylvania

Marvin R. Schlatter
Assistant Vice President for
Student Affairs
Purdue University

Philip H. Swain
Director
Office of Distance Learning
Purdue University

Evelyn Thomchick
Associate Professor
Business Logistics
The Pennsylvania State University

1998 Symposium Staff

Deborah Klevans
(Project Manager/Facilitator)
Director
Outreach Office of Program Development
The Pennsylvania State University

Larry Ragan
(Associate Project Manager/Facilitator)
Director
Instructional Design and Development
Department of Distance Education
The Pennsylvania State University

Dehra Shafer
(Associate Project Manager/Facilitator)
Program Developer
Outreach Office of Program Development
The Pennsylvania State University

Jeanne Williams
(Project Assistant)
Outreach Office of Program Development
The Pennsylvania State University

Betsie Blumberg
(Recorder)
Instructional Materials Designer
Department of Distance Education
The Pennsylvania State University

Anita Colyer
(Recorder)
Program Manager
Department of Distance Education
The Pennsylvania State University

Peggy Keating-Butler
(Recorder)
Instructional Materials Designer
Department of Distance Education
The Pennsylvania State University

Celia Millington-Wyckoff
(Recorder)
Instructional Materials Designer
Department of Distance Education
The Pennsylvania State University

Fran Osseo-Asare
(Recorder)
Instructional Materials Designer
Department of Distance Education
The Pennsylvania State University

Beth Thompson
(Writer)
Lecturer, Journalism
College of Communications
The Pennsylvania State University

Appendix C

**Distance Education Policy Symposium
October 1-3, 1995
Penn State Scanticon
University Park PA**

Delphi Procedure – Round 3 Results

The purpose of Round 3 is to give you and other symposium participants a final chance to review your Round 2 responses in the middle column in light of the entire group's responses to the items. Beneath the text of each issue, the percentage of participants indicating NO and YES in Round 2 are shown. For each issue listed, please consider again whether you believe the issue listed is a significant issue in distance education for your institution by circling NO or YES in the middle column.

For each issue that you consider significant, proceed to the last column on the right and indicate whether or not it is among the highest priority issues for discussion at the symposium. Choose no more than five under Administrative/Financial Issues and no more than five under Faculty Incentives and Rewards. We ask you to repeat this part of the survey because in Round 2 some people chose five per category while others chose only five for the entire survey.

<u>Issue</u>	<u>Consider again: Is this a significant issue for your institution?</u>		<u>(If yes) Should this issue be among the top five issues discussed at the symposium?</u>	
Administrative/Financial Issues				
How to determine who pays the costs of technology use for distance education (e.g. institution, students taking classes at a distance, all students?) NO 17% YES 83%	NO 14%	YES ---> 86%	NO 17%	YES 83%
How to clarify guidelines for incentives to organizational units that sponsor distance education NO 17% YES 83%	NO 21%	YES ---> 79%	NO 18%	YES 82%
How to cost share and allocate revenue for distance education NO 17% YES 83%	NO 21%	YES ---> 79%	NO 27%	YES 73%
What kind of formal administrative structure is needed to support the adoption of distance education NO 25% YES 75%	NO 36%	YES ---> 64%	NO 22%	YES 78%

<u>Issue</u>	<u>Consider again: Is this a significant issue for your institution?</u>		<u>(If yes) Should this issue be among the top five issues discussed at the symposium?</u>	
How to prevent high cost of technology for distance education from becoming a financial burden because of limited financial resources NO 33% YES 67%	NO 36%	YES ---> 64%	NO 22%	YES 78%
How to engage in collaborative efforts with peer institutions NO 33% YES 67%	NO 36%	YES ---> 64%	NO 44%	YES 56%
How to reduce the high cost of technology for distance education that limits what otherwise democratizes access to resources NO 50% YES 50%	NO 43%	YES ---> 57%	NO 38%	YES 62%
Whether and how to differentiate tuition between in-state and out-of-state and/or international students in distance education courses NO 33% YES 67%	NO 64%	YES ---> 36%	NO 60%	YES 40%
How to strengthen communication and develop effective vehicles for sharing experience in distance education among academic units within an institution NO 75% YES 25%	NO 64%	YES ---> 36%	NO 80%	YES 20%
How to empower an institutional spokesperson to obtain/ coordinate resources for distance education NO 58% YES 42%	NO 71%	YES ---> 29%	NO 75%	YES 25%
How to convince institutional leadership that distance education is important to the institution's future NO 50% YES 50%	NO 79%	YES ---> 21%	NO 33%	YES 67%
How to fund courses that involve multiple institutions NO 50% YES 50%	NO 79%	YES ---> 21%	NO 33%	YES 67%
How to assign credit generated by distance education within a multiple campus system NO 67% YES 33%	NO 86%	YES ---> 14%	NO 50%	YES 50%
How to overcome perception that distance education is a threat to satellite campus course offerings NO 83% YES 17%	NO 93%	YES ---> 7%	NO 0%	YES 100%

<u>Issue</u>	<u>Consider again: Is this a significant issue for your institution?</u>		<u>(If yes) Should this issue be among the top five issues discussed at the symposium?</u>	
	NO	YES --->	NO	YES
How to revise policies under which students can transfer only limited credits--or none at all--from satellite campuses or other institutions NO 75% YES 25%	93%	7%	100%	0%
Faculty Incentives and Rewards				
What support systems are needed to aid faculty in a shift toward use of technology for distance education and to provide them with opportunities to explore options in distance education NO 17% YES 83%	0%	100%	7%	93%
The need for quality standards of distance education instruction that allow for evaluation for promotion and tenure NO 8% YES 92%	7%	93%	8%	92%
Lack of clear guidelines or policies that provide faculty incentives for participation in distance education initiatives NO 17% YES 83%	7%	93%	8%	92%
How to reward the extra work required to develop technology-delivered courses NO 8% YES 92%	7%	93%	30%	70%
How to meet the need for funding for faculty development targeted for distance education NO 25% YES 75%	29%	71%	50%	50%
How to address the institution's interest and rights to the intellectual property generated by distance education initiatives NO 42% YES 58%	29%	71%	70%	30%
How to overcome faculty perception that distance education is peripheral to the university's mission NO 42% YES 58%	29%	71%	80%	20%
How to work with faculty who are not interested in using computers, let alone technology for distance education NO 33% YES 67%	36%	64%	56%	44%
How to overcome low faculty opinion of the quality of distance education NO 67% YES 33%	64%	36%	80%	20%

<u>Issue</u>	<u>Consider again: Is this a significant issue for your institution?</u>		<u>(If yes) Should this issue be among the top five issues discussed at the symposium?</u>	
How to determine the relevance or "fit" of distance education within an academic department's mission NO 58% YES 42%	NO 71%	YES ---> 29%	NO 75%	YES 25%
How to define a "section" to determine credit hours generated or payment for faculty when teaching at multiple sites via distance technology NO 50% YES 50%	NO 71%	YES ---> 29%	NO 33%	YES 67%
How to manage faculty expectations when different institutions have different reward structures for teaching via distance technologies NO 67% YES 33%	NO 86%	YES ---> 14%	NO 100%	YES 0%

The two categories that follow have not yet been submitted to participants for Round 3 responses. Therefore the percentages reported below are from responses obtained during Round 2.

Curriculum

How to take advantage of the opportunity for changes in teaching style through the use of technology	NO 18%	YES ---> 82%	NO 66%	YES 33%
How to choose technology to effectively communicate content (and not vice versa)	NO 27%	YES ---> 73%	NO 75%	YES 25%
How to better understand market preferences regarding distance education (market research)	NO 55%	YES ---> 45%	NO 60%	YES 40%
How to maintain institutional control of curriculum when students have access to courses from many different institutions	NO 45%	YES ---> 55%	NO 83%	YES 16%
How to serve the market and remain economically viable while fulfilling the university's role to create and transfer new knowledge	NO 36%	YES ---> 64%	NO 71%	YES 28%
How to retain or transfer pedagogically important on-campus experiences, (e.g., class discussions and laboratory experiments) to distance education	NO 55%	YES ---> 45%	NO 80%	YES 20%
How to address the reluctance of faculty to accept distance education credits	NO 63%	YES ---> 36%	NO 50%	YES 50%

<u>Issue</u>	<u>Consider again: Is this a significant issue for your institution?</u>		<u>(If yes) Should this issue be among the top five issues discussed at the symposium?</u>	
	NO	YES --->	NO	YES
How to evaluate distance education activities in relation to current standard course evaluation system	45%	54%	100%	0%
How to set priorities for curriculum development and delivery of distance education	27%	72%	87%	12%
How to revise policy that requires individual site approval for off-campus graduate programs when distance education can deliver courses to multiple sites including home and work	36%	63%	42%	57%
The need for standards of practice to guide curriculum development for distance education	27%	72%	75%	25%
How to revise residency requirements for graduate education that could be delivered entirely at a distance	36%	63%	85%	14%
Support Systems				
The need for training for both faculty and students in the use of technology for teaching and learning at a distance	27%	72%	50%	50%
The need for central coordination of technological infrastructure and support for program development and production	36%	63%	71%	28%
The need for support (e.g. site coordinators) to create a "user friendly" environment for faculty and students in distance education	45%	54%	83%	28%
How to maximize resources and obtain outside sources of funding to support technological infrastructure systems	27%	72%	62%	37%
How to recover costs of hardware, software and telecommunications transmission in delivery of distance education	18%	81%	77%	22%
How to make decisions about development of the technological infrastructure for distance education	27%	72%	75%	25%

<u>Issue</u>	<u>Consider again: Is this a significant issue for your institution?</u>		<u>(If yes) Should this issue be among the top five issues discussed at the symposium?</u>	
	NO	YES -->	NO	YES
How to coordinate licensing of commercially available distance education resources	63%	36%	100%	0%

**Innovations in Distance Education
Policy Symposium
September 29 - October 1, 1996
Penn State Scanticon Conference Center Hotel**

Delphi Procedure Results

Below you will find the list of issues relating to **Faculty Incentives and Rewards** that were generated by 1995 and 1996 symposium participants. For the Small Group Discussions we have categorized the issues according to function: resource allocation, rules and regulations, and accountability.

Resource Allocations Issues

The need for support systems to aid faculty in a shift toward use of technology for distance education and to provide them with opportunities to explore options in distance education	NO 0%	YES ---> 90%	NO 10%	YES 90%
NO 0% YES 100%				

How to reward the extra work required to develop technology-delivered courses	NO 9%	YES ---> 82%	NO 15%	YES 85%
NO 6% YES 94%				

How to meet the need for funding for faculty development targeted for distance education	NO 14%	YES ---> 82%	NO 26%	YES 74%
NO 11% YES 89%				

How to manage faculty expectations when different institutions have different reward structures for teaching via distance technologies (cross function)	NO 59%	YES ---> 37%	NO 45%	YES 55%
NO 44% YES 56%				

*One respondent felt that the issue should be addressed at the symposium, though it was not significant for his/her institution

Human Resource Issues

How to overcome faculty perception that distance education is peripheral to the university's mission	NO 18%	YES ---> 77%	NO 57%	YES 43%
NO 28% YES 72%				

How to overcome low faculty opinion of the quality of distance education	NO 59%	YES ---> 32%	NO 57%	YES 43%
NO 44% YES 56%				

*One respondent noted: "don't know."

How to work with faculty who are not interested in using computers, let alone technology for distance education	NO 64%	YES ---> 32%	NO 83%	YES 17%
NO 56% YES 44%				

How to orient faculty to distance students' different learning needs.	NO 23%	YES ---> 72%	NO 40%	YES 60%
---	-----------	-----------------	-----------	------------

How to change the "faculty mindset" about teaching strategies through training.	NO 27%	YES ---> 68%	NO 21%	YES 79%
---	-----------	-----------------	-----------	------------

Rules and Regulation Issues

How to address the institution's interest and rights to the intellectual property generated by distance education initiatives NO 22% YES 78%	NO 14%	YES ---> 82%	NO 16%	YES 84%
---	-----------	-----------------	-----------	------------

The need for quality standards of distance education instruction that allow for evaluation for promotion and tenure NO 28% YES 72%	NO 18%	YES ---> 77%	NO 82%	YES 18%
---	-----------	-----------------	-----------	------------

*One respondent felt that the issue should be addressed at the symposium, though it was not significant for his/her institution

How to define a "section" to determine credit hours generated or payment for faculty when teaching at multiple sites via distance technology NO 44% YES 56%	NO 37%	YES ---> 55%	NO 36%	YES 64%
--	-----------	-----------------	-----------	------------

*One respondent noted: "high priority for symposium."

How to manage faculty expectations when different institutions have different reward structures for teaching via distance technologies (cross function) NO 44% YES 56%	NO 59%	YES ---> 37%	NO 45%	YES 55%
---	-----------	-----------------	-----------	------------

How to change policy to allow distant students to be "counted" the same as full time resident students NO 32% YES 64%	NO 32%	YES ---> 64%	NO 23%	YES 77%
--	-----------	-----------------	-----------	------------

*One respondent noted: "I'm very much interested in this one."
*One respondent noted: "high priority for symposium."

Accountability Issues

How to determine the relevance or "fit" of distance education within an academic department's mission NO 0% YES 100%	NO 14%	YES ---> 82%	NO 16%	YES 84%
---	-----------	-----------------	-----------	------------

Lack of clear guidelines or policies that provide faculty incentives for participation in distance education initiatives NO 11% YES 89%	NO 5%	YES ---> 95%	NO 19%	YES 81%
--	----------	-----------------	-----------	------------

How to increase understanding of not only faculty members but also dept. heads and deans on the significant time commitment required for doing a quality job for course development via distance education.	NO 18%	YES ---> 77%	NO 41%	YES 59%
Issues relating to multiple campuses within a single institution.	NO 50%	YES ---> 45%	NO 45%	YES 55%
How to strongly support distance education when enrollments are limited by state design but the institution cannot accommodate qualified students that apply for resident admission.	NO 68%	YES ---> 27%	NO 33%	YES 67%

**Distance Education Policy Symposium
May 12–14, 1998
The Penn Stater Conference Center Hotel
University Park, Pennsylvania**

Delphi Procedure Results

Overview

The following pages include the results of the IDE policy symposium Delphi procedure. The issues covered by the survey included learner participation, curriculum development, and support services. The results for the learner participation issues note a single percentage for each topic in which the respondents were interested. The results for the curriculum and support services sections include two percentages. The final percentages are noted in bold typeface. These final percentages were based upon the initial survey results. In order to provide a point of reference, the initial survey results have also been included. The second set of percentages, which are located directly below the final percentages, represent these results.

Summary of Results

The delphi survey included a total of thirty two issues. Eleven of these issues have been highlighted as significant by more than 70 percent of the respondents. At least 80 percent of the respondents found the following issues to be significant:

- “The need for a technological infrastructure that allows distance education students to access library resources”
- “How to take advantage of the opportunity for changes in teaching style through the use of technology”
- “Creating faculty incentives to create courseware”
- “The need for training for both faculty and students in the use of technology for teaching and learning at a distance”

<u>Issues</u>	<u>Is this a significant issue for your institution?</u>		<u>(If yes) Would this issue be among the top five issues discussed at the symposium?</u>	
Learner Participation				
How to implement a fee structure for students who take distance education courses	NO 39%	YES ---> 61%	NO 46%	YES 54%
How to serve students’ academic advising/ guidance needs through a distance education program	NO 33%	YES ---> 67%	NO 43%	YES 57%
How to serve technical support needs for students taking courses from their homes, i.e., help desk support for students	NO 22%	YES ---> 78%	NO 27%	YES 73%
How to coordinate collaborative opportunities with other distance education students	NO 44%	YES ---> 56%	NO 77%	YES 23%

<u>Issues</u>	<u>Is this a significant issue for your institution?</u>		<u>(If yes) Would this issue be among the top five issues discussed at the symposium?</u>	
	NO	YES --->	NO	YES
The need for a multi-institutional credit transfer system for distance education courses	56%	44%	56%	44%
The need for an on-line registration system when distance education courses are taught over the Internet	56%	44%	70%	30%
How to determine the effect of state statutes which may limit participation in distance education by potential students	61%	39%	44%	56%
The need for a comprehensive system to provide funds for student financial aid	61%	39%	64%	36%
How to assess the effect of an institution's enrollment requirements on potential distance education students	50%	50%	60%	40%
How to evaluate student performance at a distance	33%	67%	15%	85%
The need for a technological infrastructure that allows distance education students to access library resources	11%	89%	12%	88%
How to best serve the market by developing courses that are of a quality/attractiveness that will compete effectively with the private sector	31%	69%	55%	45%
Curriculum Development				
How to take advantage of the opportunity for changes in teaching style through the use of technology	14%	86%	54%	46%
	6%	94%	56%	44%
How to choose technology to effectively communicate content (and not vice versa)	34%	66%	58%	42%
	35%	65%	55%	45%
How to better understand market preferences regarding distance education (market research)	28%	72%	43%	57%
	29%	71%	42%	58%
How to maintain institutional control of curriculum when students have access to courses from many different institutions	52%	48%	50%	50%
	47%	53%	33%	67%

<u>Issues</u>	<u>Is this a significant issue for your institution?</u>		<u>(If yes) Would this issue be among the top five issues discussed at the symposium?</u>	
How to serve the market and remain economically viable while fulfilling the university's role to create and transfer new knowledge	NO 31% 29%	YES ---> 69% 71%	NO 15% 17%	YES 85% 83%
How to retain or transfer pedagogically important on-campus experiences (e.g., class discussions and laboratory experiments) to distance education	NO 25% 31%	YES ---> 75% 69%	NO 42% 31%	YES 58% 69%
How to set priorities for curriculum development and delivery of distance education	NO 31% 41%	YES ---> 69% 59%	NO 73% 64%	YES 27% 36%
How to revise policy that requires individual site approval for off-campus graduate programs when distance education can deliver courses to multiple sites including home and work	NO 55% 47%	YES ---> 45% 53%	NO 71% 70%	YES 29% 30%
The need for standards of practice to guide curriculum development for distance education	NO 28% 24%	YES ---> 72% 76%	NO 57% 43%	YES 43% 57%
How to revise residency requirements for graduate education that could be delivered entirely at a distance	NO 64% 59%	YES ---> 36% 41%	NO 90% 86%	YES 10% 14%
Others:				
Need to address faculty incentives and rewards as they relate to distance education and curriculum development	NO 33%	YES ---> 67%	NO 50%	YES 50%
The need for an adequate number of distance education courses to fulfill the requirements for a specific degree program	NO 67%	YES ---> 33%	NO 100%	YES 0%
How to retain the laboratory experiences that the students would get in a traditional laboratory program	NO 27%	YES ---> 73%	NO 80%	YES 20%
Creating faculty incentives to create courseware	NO 18%	YES ---> 82%	NO 78%	YES 22%

<u>Issues</u>	<u>Is this a significant issue for your institution?</u>		<u>(If yes) Would this issue be among the top five issues discussed at the symposium?</u>	
	NO	YES --->	NO	YES
Support Systems				
The need for training for both faculty and students in the use of technology for teaching and learning at a distance	14% 12%	86% 88%	44% 40%	56% 60%
The need for central coordination of technological infrastructure and support for program development and production	28% 29%	72% 71%	62% 58%	38% 42%
The need for support (e.g., site coordinators) to create a "user friendly" environment for faculty and students in distance education	41% 35%	59% 65%	71% 73%	29% 27%
How to recover costs of hardware, software, and telecommunications transmission in delivery of distance education	21% 19%	79% 81%	48% 50%	52% 50%
How to make decisions about development of the technological infrastructure for distance education	41% 47%	59% 53%	83% 80%	17% 20%
How to coordinate licensing of commercially available distance education resources	71% 56%	29% 44%	75% 67%	25% 33%