ATHABASCA UNIVERSITY

# DEVELOPING A CONCEPTUAL FRAMEWORK FOR PLANNING DISTRIBUTED EDUCATION WITHIN ALBERTA'S COMPREHENSIVE COMMUNITY INSTITUTIONS

BY

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A DISSERTATION

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE

DEGREE OF DOCTOR OF EDUCATION IN DISTANCE EDUCATION

CENTRE FOR DISTANCE EDUCATION

ATHABASCA UNIVERSITY

MARCH, 2018


The future of learning.

**Approval of Dissertation**

The undersigned certify that they have read the dissertation entitled

DEVELOPING A CONCEPTUAL FRAMEWORK FOR PLANNING DISTRIBUTED EDUCATION WITHIN ALBERTA'S COMPREHENSIVE COMMUNITY INSTITUTIONS

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**Doctor of Education in Distance Education**

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## Dedication

Dedicated to my father, Dr. Warren D. Wilde, whose unwavering love, example, and friendship have guided my way.

**Acknowledgements**

I am convinced that, despite our best efforts, we accomplish very little of substance on our own. To name all those who have enabled and assisted me in this work would thus be a lengthy and ultimately incomplete task. I do, however, wish to name and thank a few who have been especially important in making this study possible.

Anna Kae Todd, long-serving vice president academic at Bow Valley College, provided support, opportunity, encouragement, and collegial friendship and guidance, without which I could never have undertaken this work. It was my privilege and good fortune to work within your sphere of influence.

Dr. Rena Shimoni, my mentor, colleague, collaborator, advisor, and friend. Most of us will meet only a few people who so dramatically change the course of our lives for good—as you have mine.

My doctoral committee members at Athabasca University, Dr. Patrick J. Fahy, Dr. Martha Cleveland-Innes, and Dr. Pierre Wilhelm. Each of you has made important and appreciated contributions to my academic journey since I first began my graduate studies as a master's degree student years ago.

Athabasca University itself, without which I might never have had the opportunity to return to my studies while also attending to the responsibilities of employment and family. This institution and its mission are dear to my heart.

Finally, and most deeply, I thank my wife, Jana Wilde, for her support and patience during this process. There really are no words to express the breadth and depth of your influence for good on my life and work. Eternal thanks.

**Abstract**

Previous research has revealed challenges faced by post-secondary institutions (PSIs) seeking to add or expand distributed education options within institutional contexts originally developed to support more traditional, face-to-face classroom learning. The qualitative study described in this dissertation used grounded theory methods to develop a conceptual framework to guide planning for of distributed education delivery within such institutions. The study is set within the context of an evolving regulatory, institutional, and technological environment and focuses specifically on those PSIs classified by the Government of Alberta as Comprehensive Community Institutions (CCIs) within the Alberta post-secondary system (defined within the dissertation). Like many other PSIs, these CCIs have gradually evolved to offer distributed delivery modes of varying structures and effectiveness and must now address gaps, inconsistencies, new opportunities, changing technologies, and potential efficiencies that may exist in their distributed education program and support service offerings. Although other work on planning for distributed education has been published, none of this earlier work has been specifically developed or tested for use within the unique context of the Alberta CCIs, which include in addition to the Alberta regulatory, financial, and historical context, the constraints and advantages of a regional stewardship mandate and, until recently, membership in an online learning consortium. This study therefore offers a unique and practical contribution to the field of distance education by building on previous work to develop a conceptual framework for the planning of distributed education delivery, grounded within data derived from within Alberta CCIs and their immediate provincial context. Such a conceptual framework for planning may become a useful tool in Alberta CCIs and may eventually form one small part of a more general theory of planning for distributed education in post-secondary education.

## Table of Contents

## List of Tables

## List of Figures and Illustrations

## List of Symbols, Nomenclature, and Abbreviations

BoG: Board of Governors

CARI: Comprehensive Academic and Research Institutions

CCI: Comprehensive Community Institution

CIP: Comprehensive Institutional Plan

eCA: eCampusAlberta

LMS: Learning Management System

MOOC: Massive Open Online Course

PLAR: Prior Learning Assessment and Recognition

PSI: Post-secondary Institution

# Chapter 1

> The study of distance learning is rather like overcooked spaghetti; once you pull on one strand, you find you are engaged with the whole tangled mass.
>
> - Sir John Daniel (2002)

This chapter provides an overview of the study, its context and connection to previous work, and the organization of the ensuing report. It describes both the Alberta post-secondary system and the specific type of institution that served as the context for the study. It further describes the challenges that make the investigation relevant, poses the initial research questions, and introduces the intended research methodology. It concludes with an overview of the definitions and terminology used in the report and limitations and delimitations of the study.

## Study Background, Overview, and Significance

As indicated in the opening quote from (Daniel, 2002) distance education is a complex and interconnected subject, making the study of any single aspect challenging. Such was the case when Shimoni, Barrington, and Wilde (2010) set out to examine best practices in supporting college students engaged in distance learning. Their initial project soon led to a second, more focused study (Shimoni & Barrington, 2010) to further illuminate the needs of "diverse" students engaged in online learning—those who may have special needs or experience other learning challenges—and eventually to a study designed to uncover and develop the role of institutional policy in enabling support for distance learners generally (Wood, 2011). These studies "demonstrated the need for dramatic improvements in learner services provided to online learners, particularly diverse learners" (Wood, 2011, p. 4) and developed an initial framework for distributed education policy development within Alberta's colleges and other similar

institutions (see Definitions and Terminology for the distinction between distance and distributed learning).

The qualitative study described in this dissertation proposes to pull at yet another sticky strand of Daniel's spaghetti that has been exposed by these and other studies: the challenge of moving beyond individual institutional policy to the development of a conceptual framework to guide detailed planning of distance (or distributed) education delivery within the context of the dynamic, rapidly evolving environment of Alberta's Comprehensive Community Institutions (CCIs). Planning is viewed as an important component of this process.

**Study background**. Alberta's 11 CCIs share a unique mandate to provide foundational and career-directed education to specific regions of the province (see Table 1 and Figure 1, below), an evolving concept known as "regional stewardship." They are also involved to varying degrees with distributed education (mostly online programs) and all were members of the eCampusAlberta (eCA) consortium (see *Definitions and Terminology*). While each CCI has a unique history, needs and challenges, their shared mandate, similar regulatory environment, and common challenges (Shimoni & Barrington, 2010; Shimoni et al., 2010; Wood, 2011) suggest to this researcher that a shared conceptual framework for planning of distributed education at these 11 institutions may be both useful and attainable and could provide a means to encourage more uniform and perhaps collaborative delivery of distributed education programming across the province in support of the Alberta government's encouragement of "further collaboration between the province's 26 publicly funded post-secondary institutions" (Government of Alberta, 2007). At the very least, the reason for differences in planning processes should be articulated, examined, and explained. Further, such a framework may

eventually contribute to a more general grounded theory for planning of distance education delivery across a wider—even global—range of PSI types and regulatory jurisdictions.

Though individual CCIs have enjoyed considerable success in delivering distance education programs, meeting the growing needs and expectations of distance learners will require development of new approaches to program and service planning and delivery. In a study of successful student support practices in distance education across the Alberta college system, Shimoni et al. (2010) found that "while examples of best practices do exist, they are generally not widespread, and student satisfaction regarding their implementation was at best tentative" (p. 57). They further noted that "the need for a major transformation, or cultural shift [in educational practice], consistent with the literature, emerged strongly from study findings" (p. 56).

One of the specific objectives of Shimoni et al.'s study was to "identify the best practices behind the best practices, namely the policies, strategies and structures required to make them happen" (p. 3). Findings in this area were mixed, but the authors identified five themes emerging from the data, each of which suggest topics for further study and together indicate the need for a systematic, multifaceted, approach to planning distributed education efforts across the Alberta college system (p. 3):

1. There is a need for a paradigm shift in the post-secondary system to incorporate a full commitment to distributed learning as opposed to the current view as an add-on to routine practice.
2. There is a lack of policy related to quality assurance and ways to measure distributed learning, and a lack of awareness regarding those policies that currently do exist.

3. While instructors play a key role in the provision of quality distributed learning, training, and support for instructors to orient them to both students' learning needs in a distributed environment and to the appropriate technology and software for online teaching are limited.
4. Coordination and collaboration is required both within colleges to share information about distributed learning across departments and systems, and between colleges to facilitate cross-college enrolment and to coordinate college-community partnerships and resources to support rural students.
5. Financial support for distributed learning is limited for both students and institutions engaged in distributed learning.

As a first step in addressing these challenges, five Alberta CCIs embarked on a process of distance education policy development to govern, systematize, and extend their distance education practice (Wood, 2011). At one institution, this new policy led directly to the formation of a "distributed learning committee" charged with the ongoing coordination of distributed education functions at the institution, including such operational tasks as communication and coordination of distributed education practice across functional areas; the identification of developmental priorities for the delivery of distributed instruction and learner services; and researching and recommending relevant best practices (Bow Valley College, 2012). Among the outputs of the committee's first year of operation—in which the researcher was a participant—was an "integrated developmental plan for the delivery of distributed instruction and services" (Bow Valley College, 2012, p. 2) which served as the basis for the college's ongoing planning for distributed education.

This study seeks to extend this work by further exploring issues that contribute to successful distributed learning at Alberta CCIs and arranging them within a conceptual framework for planning these functions and activities.

**Study overview**. The purpose of the study was to develop a conceptual framework for the planning of distributed education—grounded within empirical data—that is specifically applicable to the needs of Alberta CCIs. To this end, the following questions were considered as starting points in the investigation, additional questions arising as suggested by concepts discovered within the collected data:

1. What are generally accepted practices for planning, and how well do they fit the context of planning for distributed education delivery within an Alberta CCI?
2. What planning methods and frameworks already exist within the field of distance or distributed education (or other related areas of practice), and to what degree do they inform or assist the planning process undertaken in the Alberta CCI context?
3. What do senior leaders within Alberta CCIs and the larger Alberta post-secondary system consider key issues and considerations in developing a plan for distributed education delivery?
4. What cultural and procedural shifts are required to enable effective distributed education practices within Alberta CCIs, and how do these issues affect the planning process?

These initial questions—and others that arose as the research process progressed—were explored through the collection and analysis of data generated from document examination and interviews with 12 qualified respondents. The collected data were analyzed using qualitative

coding methods and used to derive 11 integrated concepts, which became the basis for a conceptual framework for the planning of distributed education in Alberta CCIs.

**Study significance**. Previous research has revealed challenges faced by PSIs seeking to add or expand distributed education options within institutional contexts originally developed to support more traditional, face-to-face classroom learning (Cookson, 2003; Shimoni et al., 2010; Tau, 2008; Wood, 2011). While some work has been published proposing potential solutions to such challenges, it has been mostly general in nature and based on reviews of existing literature. Additional research is required to better understand and address the unique aspects of planning for distributed education within Alberta CCIs, which includes—in addition to the Alberta regulatory, financial, and historical context—the constraints and advantages of a regional stewardship mandate and, until recently, membership in an online learning consortium.

The study described here used grounded theory methods to develop a conceptual framework to guide the planning of distributed learning delivery specifically for those PSIs classified by the Government of Alberta as Comprehensive Community Institutions (CCIs) within the Alberta post-secondary system. Like many other PSIs, these CCIs have gradually evolved to offer distributed education delivery modes of varying structures and effectiveness and must now address gaps, inconsistencies, new opportunities, and potential efficiencies that may exist in their distributed education program and support service offerings. The study thus offers a unique and practical contribution to the field of distance education by developing a conceptual framework for the planning of distributed education delivery (see *Definitions and Termin*ology), which has been discovered and rigorously grounded within data derived from documents and respondent testimony gathered within this sector of the Alberta post-secondary system. Such a conceptual framework for planning may become a useful tool for Alberta CCIs

and may eventually form one small part of a more general theory of planning for distributed education in post-secondary education.

## Study Context: The Alberta Post-Secondary System

The Alberta post-secondary education system began with the founding of the University of Alberta in 1908 and has a complex history influenced by a variety of social, economic, and political forces (Campbell, 1972) that continue to impact institutional and system planning today, and must be appreciated to understand the present context for this study. Although a full history of post-secondary education in Alberta would require a nuanced recitation well beyond the scope of this report, the purpose of this section is to provide a brief and simplified overview of the system's development as a historical context for the system in which this study took place, before providing a more complete review of the current Alberta post-secondary system and its various types of institutions.

Campbell (1972) and Small (1972) have detailed the developments from the early 1900s through the early 1960s. Barrington (1981), Clarke (1983), and Dennison and Gallagher (1986) reported on developments from the late 1960s through the early 1980s. A variety of other documents, such as Williams (1996), Dennison (2011), and Barnes (2003), various Government of Alberta reports and policy documents, along with the researcher's own experience working in the Alberta post-secondary system since 1999, are relied on to trace developments to the current context in which the study took place.

**Early 1900s to early 1960s: Institutional foundations.** Like many post-secondary systems, Alberta's has developed organically over time to meet the educational and economic needs of the province (Campbell, 1972; Clarke, 1983; Small, 1972). Many of the provincial colleges were founded and developed especially due to the influence and direction of various

religious denominations, both provincial and federal governments, and the already established University of Alberta (Small, 1972). During the first half of the 20th century, many denominational colleges were privately founded to provide religious training and post-secondary learning opportunities within growing communities, whereas provincially funded colleges were established to provide agricultural and vocational training. By 1945, the end of the Second World War, Andrews, Holdaway, and Mowat, 1997 note that:

> Alberta had a significant number and variety of postsecondary institutions, including the University of Alberta, the Institute of Technology and Art (Calgary), the Banff School of Fine Arts, two schools of agriculture (Olds and Vermilion), the Calgary Normal School, the Edmonton Normal School, and a considerable number of private colleges. Such was the basis for post-war growth. (p. 60)

During the late 1950s through the mid-1960s, another type of institution, known as a junior college, was also established with provincial government funding to provide comprehensive college-level programs and access to the first two years of university education allowing transfer to the University of Alberta (Small, 1972), the first location in Lethbridge, Alberta. Also during this period, steadily increasing federal government investment and influence led to the development of five Canadian Vocational Training Centres (CVTs) which would later directly influence the makeup of the Alberta post-secondary system.

**Mid-1960s to late 1980s: Rapid expansion and system coordination.** The late 1960s saw Alberta's population of young adults rise dramatically as part of the post-Second World War baby boom. In addition, rapid advances in technology, the emergence of new industries, increased marketplace competition, and the rapid urbanization of the population brought about the need for greatly increased post-secondary learning options and access for those leaving

farming communities to settle in Alberta's growing and increasingly sophisticated cities (Campbell, 1972). The political philosophy and climate dominant in the province during this time tended to favour individual freedom, opportunity, and personal development (Campbell, 1972; Manning, 1967) and a belief that "more colleges located throughout the province would contribute to the goal of equal educational opportunity" (Campbell, 1972, p. 19). It was during this period of expansion that the "community college" as currently understood began to emerge from the various institutions established in the earlier part of the century (Cantor, 1992; Dennison & Gallagher, 1986).

In response to these social, economic, and political forces, the 1960s saw a dramatic increase in both provincial and federal funding directed toward post-secondary education to meet rising demand (Campbell, 1972). New and different types of institutions and facilities were constructed across Canada, and "curricula became more varied, and courses proliferated in such fields as the applied arts, business, and service fields, as well as in the technologies" (p. 11), primary emphasis placed on providing access to post-secondary education for "young people who…do not, either by choice or by failure to meet the required conditions, go on to university" (Stewart, 1966, p. 15). In Alberta, at least, the drive for the establishment or further development of colleges was stated thusly:

> The purpose is to provide a valid alternative to university education for these young people. The new institutions may provide a "second chance" for students not initially qualified to enter university studies. The new institutions may also provide programs which will advance the education of students who will proceed to university (p. 15).

While the emerging college system was regarded as valuable in its own right, Stewart's comment clearly indicates that these institutions were still seen at the time as a lesser option than the established universities.

With such rapid expansion, the period from 1960 to 1969 also saw an "unprecedented increase in operating expenditures of all post-secondary institutions in Alberta by over 500 percent" (p. 13), a rate of investment that was largely dependent on the increased availability of federal funding. Due to Canada's somewhat unique (in global terms) delegation of responsibility for education to the individual provinces, direct federal funding had not yet played a major role in Alberta's post-secondary system. However, Cameron, Andrews, Holdaway, and Mowat (1997) note that "under the guise of political expediency, the federal government contends with both opportunities and pressures to assume a more prominent presence, even to the point of challenging provincial primacy in some aspects of higher education" (p. 9). Federal involvement in post-secondary education had increased sharply after the Second World War in the form of increased funding for universities and vocational training centres (Cameron et al., 1997; Williams, 1996), but the mid-to-late 1960s saw even more direct intervention and funding "based on the conviction that future growth and stability would require the capacity to manage a national labor market in order to reduce bottlenecks resulting from inadequate or inappropriate skills, information, or mobility" (Cameron et al., 1997, p. 14). It was in this environment that a further class of institution, collectively known as the Alberta Vocational Centres—later renamed colleges (Andrews et al., 1997)—was established to meet the needs of those seen to be disadvantaged or otherwise underserved by the existing colleges. Operated directly as branches of the Alberta government to provide training and access to basic education for adults seeking to upgrade their literacy and employability (Williams, 1996), the AVCs grew out of five Canadian

Vocational Training Centres (CVTs) established by the federal government in Alberta during the late 1940s and early 1950s. By the early 1960s, these "had met their need, or needs had changed" (p. 3), and only the Edmonton and Calgary locations remained open. These two institutions then became known as Alberta Vocational Centres and were rapidly followed by two additional locations in Slave Lake and Fort McMurray through a series of reorganizations by the provincial government (Williams, 1996).

Expansion of college facilities and programming throughout the province during the 1960s brought with it an increased desire to define the roles and relationships of the various colleges and universities and to coordinate the system to ensure effective and efficient delivery of programming throughout the province (Andrews et al., 1997; Campbell, 1972; Small, 1972). Whereas previously the individual institutions had functioned with only limited government oversight, extensive studies commissioned by the provincial government (Bosetti, 1972; Worth, 1972) advocated greater differentiation, coordination, and oversight of the Alberta post-secondary system (Andrews et al., 1997; Small, 1972). These two reports, undertaken by separate commissions, represented a crucial turning point in the development and governmental oversight of the province's educational system that to this day continues to influence the makeup and oversight of Alberta's post-secondary institutions.

Worth's report, titled *A Choice of Futures, A Future of Choices*, was written based on the work of the Alberta Commission on Educational Planning, which undertook an extensive review of the entire Alberta K–12 and post-secondary system to investigate social, economic, and technological trends in Alberta over a 20-year horizon and to recommend changes, structures, and priorities necessary for a comprehensive provincial education system to meet the needs of the province into the future (Cameron et al., 1997; Worth, 1972). The organic and

somewhat reactive and uncoordinated nature of Alberta's educational system and its institutions had resulted in a sprawling landscape of organizations composed of (Worth, 1972):

> …over 1300 elementary and secondary schools, three agricultural and vocational colleges, two technical institutes, six community colleges and four universities. In addition, there are a number of special-purpose institutions like the School for the Deaf, the Forest Technology School and prison schools, many vocational training and apprenticeship centres, almost 20 schools for the preparation of health sciences personnel, over 40 proprietary or registered trade schools, a variety of private institutions (including five colleges and over 250 kindergarten-nursery schools) plus a vast array of other agencies offering formal instruction such as libraries, professional associations, museum and art centres, municipal parks and recreation departments, trade associations, the YMCA and the YWCA, community leagues and youth centres (p. 45).

Worth's charge was to review this entire system and make recommendations for how it might be best organized and coordinated to meet the needs of Alberta's citizens and economy well into the future.

The Worth report was notable not only for its scope but also for its impressively accurate look at potential futures for education, including the role of information technology and related communications systems some 20 years before the advent of the publicly accessible Internet and a decade before practical and affordable home computers became available. The kinds of technological developments he foresaw have allowed for the rapid expansion of the distributed education systems employed at Alberta PSIs today:

> By the 1990's, over half of the homes in the country will be equipped with devices which permit on-demand retrieval of information, displayed on the home TV, for

> purposes such as catalogue searching and news. More advanced homes services, involving two-way interaction between persons, or between person and machine, are likely to be introduced before the turn of the century (p. 16).
>
> and
>
> One of the most significant changes in future education will be the extent to which technological systems and services will be used, not only in institutions for schooling but also in the home. Technology will provide devices to be employed by teachers as aids to instruction. Students will employ various devices to obtain information and to learn through self-serve techniques. Computers and information banks will be used for a number of educational purposes, such as recordkeeping, retrieval, analysis and instruction. Technological services will also facilitate research (p. 17).

Worth's report also made several specific recommendations for the management and alignment of the province's post-secondary system. Perhaps the most significant in the context of this study were the recommendations that:

- Higher education in Alberta should be "rebuilt as a fully federated system" to "abolish a non-functional hierarchy of prestige" (p. 82). Such a system was envisioned as a way to clarify the roles and responsibilities of each institution, increase differentiation and reduce duplication, and allow semi-autonomous but coordinated functioning of the various post-secondary institutions.
- The Edmonton and Calgary AVCs should be amalgamated with the existing community colleges in those cities (meaning Grant McEwan College and Mount Royal College respectively), and work should commence toward realigning or amalgamating the other AVCs into the mainstream college system over time. This recommendation was due in

large part to the complicated funding relationship of these institutions with the federal government but also on the belief that providing more comprehensive programming would better meet the needs of future AVC students. (As we will see below, this recommendation did not come to pass, with significant impact on the institutional landscape.)

- An organization should be established to provide opportunities for distance learning to all citizens of the province. Citing distance as "perhaps the greatest single reason for in-accessibility to education in Alberta" (p, 98), Worth called for the establishment of a geographically independent institution he named "The Alberta Academy" whose mission would be to serve the educational needs of those located in remote areas or whose work and family lives precluded regular attendance at the existing institutions. Worth envisioned a system allowing for personalized, interactive education based on emerging information and communications technologies, some of which were already in use at Alberta PSIs—such as the then newly emerging Athabasca University. Worth wrote:

> While the academy would have no campus, and be neither university, nor a college, nor a technical institute, it would act as a staging agency for, and provide entrance to, all of these institutions—or to others, as they are created. In fact, it might be thought of as a concept rather than as a place. While it would grant no degrees itself, the academy could offer transfer credits towards degrees and diplomas—as well as offering an individualized diploma program of its own. And it is reasonable to expect that there are now thousands of people in our province waiting for

> the kinds of opportunities that could be provided by the Alberta Academy (p. 99).

The "Alberta Academy" as proposed by Worth was not implemented by the provincial government. However, its aims and ethos of open and accessible distance learning were certainly reflected in the full establishment of Athabasca University during this time period, as well in the later establishment of eCA.

Like Worth, Bosetti was charged with studying learning systems in Alberta and making recommendations for how best to coordinate and adapt to meet the challenges of the future. Bosetti's report, *The Alberta System of Post-Secondary Non-University Education: Master Plan #1*, was published by the Alberta Colleges Commission and intended to complement Worth's concurrent project (Bosetti, 1972). The major difference between the two projects was scope: Worth's report examined the totality of educational systems in Alberta with long-term focus. Bosetti's report was constrained to non-university post-secondary systems in the province and had a somewhat more immediate and medium-term time horizon.

Despite the differences in their mandates, there are many interesting similarities (and differences) in the conclusions and recommendation of the two reports. The following are most relevant to the context of the current study.

Both reports recommended the

- establishment of an integrated system of advanced education coordinated by a single planning-review agency of government for both universities and colleges rather than the dual system that existed at the time. Both reports commented extensively on the challenges and inefficiencies of a completely uncoordinated system of higher education in meeting the individual and economic needs of the citizens of Alberta;

- maintenance of a degree of institutional autonomy within such a coordinated system in order to meet the needs of individual communities;
- greater role clarity and differentiation for each of the institutions to balance access needs with efficiency and reduced system redundancy; and
- development of flexible and distance learning options "designed to meet the needs of those traditionally excluded from advanced education by virtue of age, sex, geographic location, or social or economic disadvantage" (p. 5).

Bosetti strongly supported the distinct role of community-based colleges in meeting the needs of Alberta's increasingly diverse citizens and expanding economy, and especially the importance of these institutions remaining distinct from the university model. He wrote:

> The need for specialized services and for institutions providing alternative models of instruction, values, and attitudes is urgent if we aspire to developing and maintaining a pluralistic society. Community colleges form the leading edge of efforts to extend educational opportunity beyond the elite to all citizens. They were designed to provide desirable alternatives to the traditional university pattern of education by developing new educational opportunities to suit the particular needs of their respective clienteles. But the pressures for conformity and status are taking their toll. Pressures from universities for uniform requirements for transfer tend to augment similarities between colleges and universities. The availability of highly qualified academic personnel as college instructors adds to the trend toward a conventional academic format. Community and faculty pressures for status encourage the development of traditional programs and the attraction of academically talented students….Community colleges must resist pressures for uniformity. They must expand opportunities for adults to increase their occupational

> skills, to begin an academic career, to enrich the quality of their lives, and to multiply their educational options and their chances to choose wisely from among them (p. 13).

However, he also joined with Worth in identifying the challenges associated with an uncoordinated post-secondary system:

> The Alberta post-secondary educational system has tended to operate in an uncoordinated manner with institutions and sub-systems proceeding relatively independently of each other. While institutional and sub-system independence is necessary to promote flexibility in meeting educational needs, this independence must be extended only within the parameters of broad system policies. Lacking such parameters, independent institutions and sub-systems may tend to expend resources in their own maintenance and growth, and may increasingly resist change which threatens the sub-system or any of its members. Such a situation provides little assurance that the delivery system will fulfill existing or emerging needs. Lack of coordination is evident in the manner in which responsibility for providing services has been allocated. In the past, this has occurred largely by default (p. 14).

Another important contribution found in Bosetti's report is the emphasis on new ways of measuring progress within the post-secondary system and especially an emphasis on institutional accountability and quality assurance, rather than the more usual reliance on statistical growth measures. He stated: "We have lived in an era when more education became synonymous with better education. There is today ample evidence of a deepening concern for the quality of education. Growing public and student disaffection with educational institutions and with the methods and content of education has manifested itself in reduced levels of financial support and in demands for accountability" (p. 16) He goes further, stating:

"Assessments of the quality of educational services rendered might be based upon how well the institution attracts and retains those in greatest need of education, upon how well individual differences are developed, and upon how well the student does after graduation" (p. 17). Given the importance that accountability and metrics have played in the later development of Alberta's post-secondary system, Bosetti's call seems prescient.

Finally, Bosetti also echoed Worth in recommending that the province "incorporate the Alberta Vocational Training Centres at Calgary and Edmonton into the community colleges in those cities" (p. 6), a key question that the province would resolve differently later in the 1990s by converting those AVCs into independent, board-governed colleges.

Later during this period, at least partly due to the adoption of certain recommendations of the Worth and Bosseti reports, "efforts to achieve greater coordination of postsecondary education became more authoritative" (Andrews et al., 1997, p. 76) under the newly elected (1971) Progressive Conservative party. The Department of Advanced Education was formally established in 1972 and:

> marked the beginning of a period of greater central scrutiny and control of post-secondary expansion. The costs of higher education and Alberta's dependency on non-renewable resources became important issues. In order to control and direct expenditures, while restraining the costs of system, greater central involvement seemed to be required. The government's stance thus became one of carefully considered expansion under fiscal restraint (Andrews et al., 1997, p. 76)

As a result of the government taking a more cautious approach to post-secondary expansion, institutions were required to submit proposals for program additions, which were

then reviewed at the ministry "in relationship to demand, present availability, and general impact on the system" (Andrews et al., 1997, p. 77) before funding could be approved.

**Early 1990s to mid-2000s: Economic challenges and system constraints.** Beginning in the mid-1980s, Alberta's oil industry began to suffer economic weakness. Given the province's significant reliance on revenue from the energy sector, the provincial government began to re-examine expenditures, including the financing of PSIs—a period Andrews et al. (1997) characterize as "reductionist" in comparison to the "reconstructionist" post-Second World War period (p. 87). Some limited system expansion took place during this time, but "projects were now more carefully targeted, and the government urged institutions to streamline, downsize, and strategically plan their allocation of resources" (Andrews et al., 1997, p. 82). Each institution was

> required to submit a formal development plan which included statements of purpose and aspects of program planning to the Department for approval [reflecting] a move by government towards more centralized monitoring of the system in times of economic restraint. Institutions were encouraged to concentrate on long-range, strategic planning and to reassess their goals and missions continually (p. 82).

In 1993, as provincial revenues were still struggling, the government announced plans to achieve a balanced budget by 1997. In keeping with this directive, the ministry responsible for post-secondary education announced budget cuts to PSIs totalling 21% over three years, at the same time creating a new "Access Fund" meant to "finance program proposals that focus on innovative cost-effective methods and partnerships that increase learning opportunities and access for Albertans" (Andrews et al., 1997, p. 84). The Access Fund turned policy sharply toward economic goals and competition amongst Alberta PSIs, as it was intended to "create

additional [student] places through competitive bidding" and priority was "given to innovative proposals that increase long-run effectiveness and efficiency and meet labour market needs" (Government of Alberta, 1994, p. 7). In addition, the fund invited competition from private education providers, further emphasizing competition.

Later in 1994, the ministry released a policy document that identified four major goals for Alberta's public postsecondary institutions: "increased accessibility, improved responsiveness, greater affordability, and more accountability" (Andrews et al., 1997, p. 85). At the same time, the province introduced a revised, single operating grant for each institution combined with some additional performance-based funding.

One of the results of the ministry's policy and funding direction was an increasing emphasis on both efficiency and entrepreneurial activity (including distributed education) within the PSIs in order to cope with reduced government support. It was within this fiscal environment—combined with the rapid emergence of the public Internet and online learning technologies—that the eCA consortium was formed.

An essential component in understanding the history of Alberta's post-secondary system as it relates to planning for distributed education beginning in this period is appreciation of the central role of eCA during its existence from 2002 to 2016. Established to facilitate greater access to high-quality online learning opportunities, eCA was a consortium of Alberta post-secondary institutions originally including all of those designated as CCIs and eventually all 26 Alberta public PSIs (eCampusAlberta, 2012). The intention of the consortium was to facilitate "increased access to high quality online learning opportunities" across the Alberta post-secondary system and to encourage the member institutions to "develop best practices and

increased opportunities for online learning" and to "increase quality standards and approaches as well as realize resource efficiencies" (p. 1).

Student participation in eCA courses increased rapidly after the organization was formed, reaching 22,186 total registrations in fiscal 2013/14 (eCampusAlberta, 2014). For many years it enjoyed strong support from PSI and ministry leaders though it never received formal ongoing financial commitment from the province and instead relied largely on membership fees and tuition sharing to fund operations. Courses were delivered based on a lead and partner model, in which the "lead institution develops and offers the course or program and provides the instruction and materials in an online environment [and the] partner institution offers support services, such as access to the library and exam supervision as well as research and study skills support" (eCampusAlberta, 2012). (The researcher was an active participant in eCA for most of its existence, serving several years as an operations committee member representing one of the CCIs.)

Respondents interviewed for this study were generally positive regarding the influence of eCA on distributed learning within the Alberta system, especially in exposing areas in need of development, encouraging collaboration, and establishing quality standards for online program delivery. Despite these many positives, however, the consortium also suffered from a lack of appropriate governance and system leadership required to coordinate such an effort, a view confirmed by study respondents (see Chapter 4) and shared by the researcher. Political pressure to involve all Alberta PSIs within the consortium without regard to size or mandate, combined with the inherent challenges of institutional self-interest, revenue sharing, and leadership turnover eventually led the consortium to a point where its business model no longer worked for

enough of its membership. As a result, the consortium officially ceased operations on March 31, 2017.

Although this study was not specifically about eCA, its planning and data collection took place within the setting of the consortium's long-time existence and increasingly unstable situation, and eventual collapse. As a result, many of the study respondents framed their thoughts within the context of how eCA had influenced distributed learning in Alberta and how institutions might organize this function without the consortium.

**Current state.** The Alberta post-secondary system currently operates under a still emerging framework for institutional and community collaboration known as "Campus Alberta", whereby "learning providers collaborate to deliver quality and innovative learning opportunities—where and when Albertans need them— to enhance their social, cultural, and economic well-being" (Government of Alberta, 2002, p. 2) that focuses on the learner rather than on the individual learning provider. Under this framework, all publicly funded post-secondary institutions—along with the apprenticeship and industry training system—are expected to work together to achieve common outcomes, most recently articulated as the Alberta Adult Learning System Principles (Government of Alberta, 2016):

- Accessibility
- Affordability
- Quality
- Accountability
- Coordination

Since 2007, the 26 publicly funded PSIs have been organized into six sectors (i.e., categories) according to mandate as shown in Table 1 (Government of Alberta, 2007).

Table 1

*Alberta Six-Sector PSI Classifications*

| Institution Category | Institution Names |
|---|---|
| **Comprehensive academic and research institutions** | Athabasca University<br>University of Alberta<br>University of Calgary<br>University of Lethbridge |
| **Baccalaureate and applied studies institutions** | MacEwan University<br>Mount Royal University |
| **Polytechnical institutions** | Northern Alberta Institute of Technology (NAIT)<br>Southern Alberta Institute of Technology (SAIT) |
| **Comprehensive community institutions** | Bow Valley College<br>Grande Prairie Regional College<br>Keyano College<br>Lakeland College<br>Lethbridge College<br>Medicine Hat College<br>NorQuest College<br>Northern Lakes College<br>Olds College<br>Portage College<br>Red Deer College |
| **Independent academic institutions** | Ambrose University College<br>Canadian University College<br>Concordia University College of Alberta<br>The King's University College<br>St. Mary's University College |
| **Specialized arts and culture institutions** | Alberta College of Art and Design<br>The Banff Centre |

This study focused on the unique role of the 11 CCIs, which is to "provide broad programming, including apprenticeship where demand warrants, certificate, diploma,

foundational learning, and upgrading" (Government of Alberta, 2007, p. 9). These institutions may provide university transfer and applied degrees, but "baccalaureate degrees will only be provided if feasible, in alignment with areas of specializations, and primarily in collaboration with a degree-granting institution" (p. 9). Unlike the other institutional categories, CCIs are aligned with geographical service areas to facilitate regional planning. This has led to the concept of "regional stewardship" in which the local CCI is responsible for providing adult learning opportunities within their defined region of Alberta and emphasizes the need for these colleges to develop expert capacity in providing distance and blended learning options along with excellent services to support learners choosing these delivery modes (Government of Alberta, 2012).

Table 2

*Alberta CCIs and Primary Geographic Service Areas*

| **Institution Name** | **Primary Geographic Service Area** |
|---|---|
| Bow Valley College | Calgary and region |
| Grande Prairie Regional College | Northwestern Alberta |
| Keyano College | Northeastern Alberta |
| Lakeland College | East Central Alberta |
| Lethbridge College | Southwestern Alberta |
| Medicine Hat College | Southeastern Alberta |
| NorQuest College | Edmonton and region |
| Northern Lakes College | North Central Alberta |
| Olds College | West Central Alberta / Alberta |
| Portage College | East Central Alberta |
| Red Deer College | Central Alberta |

An overview of the Alberta post-secondary system by region, including the geographical areas assigned to the CCIs is found in Figure 1.

*Figure 1.* Alberta post-secondary system map. From *Campus Alberta planning resource 2015*, Government of Alberta, 2015, p. 68.


## Definitions and Terminology

Most terms used throughout this report will be familiar to readers involved in the study, practice, or administration of post-secondary education. A few terms or concepts have specific or narrow definitions within the study and are detailed here for clarity.

Table 3

*Specifically Defined Report Terminology*

| Term | Definition |
|---|---|
| **Distributed education and related terms** | Numerous definitions have been offered to describe the practice of teaching and learning at a distance (see also Chapter 2), most emphasizing situations in which teacher and learner are separated by time, space, or both, and technology is used for communications among all the parties (Kanuka & Conrad, 2003; Keegan, 2013; Schlosser & Simonson, 2006. This report makes use of four related but separate terms to describe such distance education methods but prefers the term *distributed education* as the broadest and most inclusive.<br><br>**Distributed education** is used here as operationally defined within policy by one of the Alberta CCIs. In this context, the term has been specifically designed by a college committee to be broadly inclusive of a range of program delivery strategies and modalities, including those employing elements of face-to-face instruction at multiple locations—including regional sites in areas without a campus—in combination with various technologically mediated communication methods.<br><br>The specific definition used by this CCI is as follows (Bow Valley College, 2012):<br><br>> Distributed learning [or education] refers to an instructional model which utilizes specialized design and delivery processes so that instruction and learning can occur without instructors and learners necessarily being together at the same place and/or time. It utilizes a range of information distribution and communication technologies—such as print-based materials, audio/videoconferencing, Internet, and other data networks—to enable distributed teaching and learning processes. Distributed learning can be either the primary modality for the delivery of instruction and services or a complement to and an integrated component of the face-to-face delivery (p 1).<br><br>Where other PSIs or organizations use a materially different definition of distributed education, it will be noted in the research report.<br><br>**Distance education** is used here as a generic term when discussing any educational practice in which the teacher and learner are normally separated by time and/or space. This term is purposefully broad and mostly employed when discussing the history or general |

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| | characteristics of such practices or where the term distributed learning would be excluded based on its definition above.<br><br>**Online education** is used here to denote "Internet-based learning that delivers content and enables communication between instructor and students" (Cleveland-Innes, 2010, p. 2). The term can refer to both synchronous (same-time) and asynchronous (different-time) participant interaction.<br><br>**Blended education** refers here to educational practice that combines face-to-face student interaction with one or more distance education methods. |
| **Comprehensive Community Institution (CCI)** | This term refers to one of 11 Alberta post-secondary institutions with a specific mandate to provide a broad range of certificate, diploma, foundational learning, and upgrading programming and to steward learning opportunities for Albertans within an assigned geographical region. |
| **Substantive theory** vs. **formal theory** | Grounded theories are often labeled as either substantive or formal—depending mainly on the degree of specificity to a defined area of study (Charmaz, 2006; Corbin & Strauss, 2008). Darkenwald (1980) notes that "substantive theory is close to the real-world situation" while "formal theory, in contrast, deals with a general domain of social science…and is necessarily more general and conceptually abstract" (p. 67). This study seeks to develop a substantive theory of planning for distributed education delivery (in the form of a conceptual framework) within a specific and limited context, rather than a more formal theory that might be generalized to broader planning exercises. |
| **eCampusAlberta (eCA)** | Established in 2002, eCampusAlberta was an online learning consortium eventually consisting of all 26 Alberta post-secondary institutions. The consortium's role was to facilitate greater access to online learning opportunities by extending the reach of the Alberta PSIs across all communities in the province through online learning. The consortium ceased operations on March 31, 2017. |
| **Conceptual framework** | A conceptual framework refers to a broad outline of interlinked items which supports a particular approach to a specific objective and serves as a guide that can be modified as required by adding or deleting items and represents some level of theory. The term is used here as described by Jabareen (2009) and refers to "a network, or 'a plane,' of interlinked concepts that together provide a comprehensive understanding of a phenomenon or phenomena" (p. 51). In this report, it is used specifically in the context of a conceptual framework for |

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| | planning, to refer to a set of concepts and questions that will be created to guide the development of planning for distributed education delivery within Alberta's CCIs. |
| **Planning** | This term refers to the general process of developing methods or schemes in preparation for their implementation and has long been considered one of the fundamental activities of management—along with organizing, leading, commanding, and controlling (Clegg, Clegg, & Bailey, 2007). |
| **Post-secondary institution (PSI)** | This term is used to refer generally to any institution of advanced or higher learning (i.e. beyond high school), such as a university or college. Within this document, it most frequently refers to one of the 26 institutions of advanced learning defined and recognized as members of the Alberta advanced education system. |
| **Program (of study)** | This term refers generally to any course of study offered by a PSI which leads to a credential or other form of recognition for satisfactory completion. Individual PSIs may assign more restrictive criteria to differentiate various types of programming. |
| **Regional stewardship** | This term refers to the idea that each Comprehensive Community Institution (CCI) is responsible for stewardship of adult learning opportunities within a defined geographical region of Alberta. |
| **Single-mode delivery vs. dual-mode delivery** | This set of terms refers to the breadth of program delivery modes offered by an educational institution.<br><br>**Single-mode** educational institutions are focused almost exclusively on a single mode of program delivery. For example, an institution that offers only face-to-face, cohort-based instruction options would be defined as single-mode. While this is the most common example of a single-mode institution, a smaller number of institutions focus almost exclusively on distance education and can thus also be defined as single-mode.<br><br>**Dual-mode** institutions offer two options for program delivery, normally a face-to-face option and a distance delivery option. It is also possible to refer to **blended-mode** delivery institutions, which offer programming using multiple combinations of face-to-face and distance delivery options, often combined within single programs or courses. |

| | |
|---|---|
| **Support service** | Support service may refer to any service beyond direct instruction and assessment offered to assist students in their studies or as a part of their engagement with the educational institution. Common examples include personal and career counselling, financial aid, library services, remedial or tutorial seminars. |

## Limitations and Delimitations

The limitations of this study are similar to those described for most qualitative research studies: they are descriptive in nature (as most desirable in this case) and "their findings cannot be extended to wider populations with the same degree of certainty that quantitative analyses can…because the findings of the research are not tested to discover whether they are statistically significant or due to chance" (Atieno, 2009, p. 17).

Although the proposed study will draw on broad source material as background, much of its original data will be obtained from documents and interview respondents within Alberta's post-secondary system and especially from with the Alberta CCIs. The conceptual framework developed as the main output for the study will thus be grounded mostly within the Alberta CCI context and cannot be assumed applicable to other institution types or jurisdictions. Further, the conceptual framework is not envisioned as a complete "toolkit" for distributed education planning. Rather, the goal was to develop a substantive theory for such planning which might serve as a starting point for development of more specific models to be used within individual institutions as well as for additional research toward more complete and generalizable theories of planning of distributed education which are grounded in additional data.

## Summary

This chapter introduced the topic, background, and significance of the study. It highlighted the complexity of the Alberta post-secondary system and the potential benefits that

might be realized from the development of a conceptual framework for planning for distributed education, especially for those PSIs designated as CCIs within that system. It provided a brief history of the Alberta post-secondary system as the context for study and as a way to assist readers in understanding the reasons for some of the issues and challenges revealed during the study and how the history of the province's post-secondary system continues to influence planning for distributed education. Further, it provided an overview of the specialized terminology used through the report. Finally, it offered an overview of the limitations and delimitations of the study.

The next chapter will review relevant literature to further set the context for the study and help to establish how the study contributes to the existing body of work in related fields of practice and especially to planning for distributed education.

# Chapter 2

## Literature Review

> Effectively distance education, and higher education generally, are entangled in a double helix of spiraling technological change linked with perpetual obsolescence as "continuing scientific and technological innovations" create discontinuity, uncertainty and risk in what is becoming an increasingly technologically dependent sector.
>
> - Terry Evans and Brian Pauling (2010, p. 201)

This chapter provides a review of the available literature intended to furnish background and context for the study, while at the same time illuminating its significance within the existing literature and state of practice. The chapter is divided into three main topic areas:

- distance and distributed education foundations, including history, definitions, and consortia approaches,
- forces of change and the future of post-secondary education, including technology, institutional structure, and current trends, and
- approaches to planning both generally and specifically within educational systems, including review of the literature on approaches and methods for planning in distributed education and discussion of development and application of conceptual frameworks.

This overview of literature draws not only on journal articles and books from the academic literature but also on reports aimed at college administrators and works intended for a wider audience of readers interested in the future role of higher education in society.

## Distance and Distributed Education Foundations

To clarify the place of the current study within the existing body of distance education research, a review of relevant literature was undertaken to establish the generally agreed-upon history, definitions, and concepts within the field.

**History of distance education**. Although formal distance education has existed in a variety of forms for over a century (and perhaps longer, depending on the definition used), advances in communications technology—especially the advent of the publicly accessible Internet—have led to the rapid expansion of distance-delivered programs at traditional post-secondary institutions. Several authors have provided detailed accountings of the history and development of distance education, its theoretical developments, and stages of practice (Casey, 2008; Garrison & Cleveland-Innes, 2010; Moore, 2003; Schlosser & Simonson, 2006), the various authors placing differing emphasis on issues of history, individual actors, theory development, and technological advances as organizing principles in relating the story. Although a full retelling of this history is beyond the scope and purpose of this literature review, many of the important events, actors, and developments in the field are highlighted below to situate the current study within the larger field and context. The researcher here follows the organizational scheme set out by Garrison and Cleveland-Innes (2010), while drawing on additional sources and noting where credit for specific ideas is due various individual authors.

***Industrial era***. The cited authors generally agree that the advent of distance education dates to at least 100 years ago, the postal system serving as the first practical means of conducting print-based correspondence education. Moore (2003) places the beginnings of correspondence education in the United States at the founding of the Chautauqua

Correspondence College in 1881, and Schlosser and Simonson (2006) indicate European origins as early as 1833.

The Industrial Era of distance education is so named due to its association with Fordist concepts such as division of labour and economies of scale, which were incorporated to deliver distance learning opportunities to large student populations (Garrison & Cleveland-Innes, 2010). Also referred to by Moore (2003) as the Modern Era, it began in the late 1960s with the work of individuals such as Charles Wedemeyer, Otto Peters, Börje Holmberg, and Michael Moore as the leading distance education theorists, soon joined by others as the field grew and developed. Work during this era was characterized by investigation of the relationship between student autonomy and independence and the degree of structure and communication provided by distance course designs. This period saw the articulation of transactional distance theory by Moore (1997), which provided a framework describing the relationship between 1) instructional dialogue, 2) program structure, and 3) learner autonomy. He hypothesized that the purposeful design of these three factors within a distance education setting could contribute to the lessening of the "transactional distance" between instructor and student, "a psychological and communications space to be crossed, a space of potential misunderstanding between the inputs of instructor and those of the learner" (p. 22).

***Role of media***. As described by Evans and Pauling (2010), the development of distance education is tightly linked to the development of information technologies that allow ever more effective and reliable communication and collaboration between individuals separated by time and/or distance. Indeed, Casey (2008) organizes her retelling of distance education's history around significant developments in communications technologies and media, and many of the theoretical developments of the later industrial/modern era of distance education would not have

been meaningful or even possible were it not for the rapid advent of two-way communication technologies using the public Internet. As noted by Garrison and Cleveland-Innes (2010), further contributions to theory by Garrison and Shale (1987) regarding the value of two-way dialogue in distance education were shaped by the advent of technologies that allowed such interaction with fewer compromises than had previously been the case.

Casey (2008) lists the important stages and types of technology use in distance education as radio, television, computers (pre-Internet), satellite communication, and finally Internet communication. In tracing these technological developments, it is important to note that the earlier technologies were focused on one-way dissemination (i.e. broadcast) of learning materials, whereas later stages have allowed true two-way, multimedia, low-cost, and increasingly reliable communications between instructors and students. The pedagogical possibilities enabled by such increasingly sophisticated technologies have begun to reshape distance education theory and practice in recent years, the emphasis shifting toward the "traditions of conventional higher education founded in discourse and the collaborative construction and confirmation of knowledge" (Garrison & Cleveland-Innes, 2010, p. 18).

***Post-industrial era***. This period began with the advent of advanced Internet communications technologies that allow adoption of "many of the educational assumptions associated with interactive and collaborative learning" (Garrison & Cleveland-Innes, 2010, p. 20) and coincides with more general technological disruption of higher education (see Forces of Change and the Future of Post-Secondary Education). It is characterized by the rise of online, Internet-based programs as the dominant form of distance education, making use of both synchronous and asynchronous modes to enable constructivist communities of inquiry that were not possible or necessarily sought after in earlier forms of distance education (Garrison &

Cleveland-Innes, 2010). A strong representation of the ethos of this era can be seen in Anderson's (2003) response to Moore's (2003) paper on the history of distance education. Addressing what he sees as Moore's overemphasis of independent study as a defining feature of distance education and unwillingness to accept its displacement by technological developments, he writes:

> The problem arises from a technologically determined, historically contingent assumption that distance education means independent study. When the only technology of distance education delivery was the postal system, the only possible interaction and dependent pedagogy was one that evolved to minimize the constraints of the technology and maximize its affordances….It is true that [distance education] can very effectively support independent study, but I don't agree with Moore that this is a defining feature of distance education. Rather it is just one of the pedagogical techniques that can be employed (p. 58).
>
> and
>
> A way I have come to understand the evolution of [distance education] pedagogy is to think of its earliest forms as being based upon independent study. Next came collaborative-based learning models; and the emerging third stage is agent-assisted learning (as in autonomous agents associated with the semantic Web technologies). Like earlier discussions of the generations of distance education, my classification system does not assume that one generation replaces another. Rather the pedagogical affordance of each generation allows more choice and freedom for distance education system designers, teachers, and learners to create learning sequences built upon appropriate combinations of the three types of distance learning (p. 58).

***Blending and convergence***. For this researcher, the blending and convergence phase in the development of distance education as identified by Garrison and Cleveland-Innes (2010) accurately portrays the current climate within the Alberta CCIs. As these authors note, "the landscape in higher education is changing as institutions compete for students in terms of flexible access and providing for meaningful, collaborative learning experiences. The blending of online and face-to-face approaches suggests the possibility of a merging of post-industrial distance education and conventional higher education" (p. 21). Indeed, much of the researcher's professional practice within his own institution has shifted away from development of strictly distance or online delivery modes to focus on blended modes of delivery (see *Forces of Change and the Future of Post-Secondary Education* below) that combine the best elements of synchronous and asynchronous technologies with traditional face-to-face and small-group tutorial sessions to provide students with high-quality, flexible, and accessible learning options driven by student choice. It is this era of convergence that caused the researcher's institution to largely abandon the term *distance education* in favour of the more inclusive *distributed education*, as described in Chapter 1 and in more detail in the next section, though this change in terminology has little impact on planning for such activity

**Development of distance education definitions**. As noted in Chapter 1, numerous terms and definitions have been employed by authors in the field to describe the practice of conducting teaching and learning activities in which teachers and learners are separated by time and/or space. Moore and Kearsley (2011) succinctly define distance education as "teaching and planned learning in which teaching normally occurs in a different place from learning, requiring communication through technologies as well as special institutional organization" (p. 2). While the concept of "communication through technologies" has become almost synonymous with

Internet-based communications in recent years, Schlosser and Simonson (2006) point out that any sufficient technology—including the print and postal systems often used in earlier forms of correspondence education—also meet the requirements of this definition.

Keegan (2013) extensively reviewed the potential definitions of distance education and noted that the range of potential program structures, activities, technologies, and instructor-student interactions is too vast and challenging to capture in a single definition. He proposed a set of five characteristics as a "middle ground between the extremes of defining distance education so narrowly that it becomes an abstraction which does not correspond to existing reality, or so broadly that it becomes meaningless as the basis for analysis and the development of grounded theory" (p. 51). These characteristics are (adapted from pp. 50–51):

- quasi-permanent separation of teacher and learner throughout the length of the learning process to distinguish it from conventional face-to-face education
- influence of an educational organization both in the planning and preparation of learning materials and in the provision of student support services to distinguish it from private study;
- use of technical media—meaning print, audio, video, Internet, etc.—to unite teacher and learner(s) and carry the content of the course;
- provision of two-way communication so that the student may benefit from or even initiate dialogue, to distinguish it from other uses of technology in education; and
- quasi-permanent absence of the learning group throughout the length of the learning process, so that people are usually taught as individuals rather than in groups, with the possibility of occasional meetings, either face-to-face or by electronic means, for both didactic and socialization purposes.

Other authors contend that the complexity and assumptions of the learning context contribute to the challenge of definitions in distance education. Menconi (2003), for example, notes that, within some folk or grassroots educational traditions, the emphasis on institutional organization may be less applicable, and distance education might be simply defined as any situation where some form of learning takes place where the "instructor is absent at least most of the time" (p. 106).

More recently, researchers and practitioners in distance education have sought to combine the best elements of traditional face-to-face classroom instruction with various forms of distance education—usually using the now dominant online learning management systems (LMS)—as well as various web conference tools or other forms of online synchronous communication. The resulting delivery modes are often referred to as "blended" or "hybrid," the terms often used interchangeably (McGee & Reis, 2012) though the same authors note that "Hybrid suggests that one mode is unused while the other is used. Blended suggests that there are no perceivable notifications when modes shift, if they do at all. In this manner, blended courses are then seamlessly operational where the transition between classroom meeting and online component is minimal" (p. 8). Schlosser and Simonson (2006) provide the simple definition of blended learning as "a class that is conducted both by face-to-face classroom meetings and distance learning activities," which seems accurate but not sufficiently descriptive to account for the many blended education modes now in use. Macdonald (2008) categorizes such offerings into three types:

- Courses for campus-based students, where instructors and students meet regularly in a face-to-face setting, but where online or printed materials are used as part of structured, directed self-study along with opportunities for asynchronous online discussions;

- Courses exclusively for distance students, where asynchronous online courses may employ synchronous online meetings, telephone conversations, and possible supplemental face-to-face meetings to enhance the course or add necessary structure; and
- Courses that include both campus-based and distance students who interact but are physically separated. As McGee and Reis (2012) note, this model of blended education is similar to the HyFlex model described later in this chapter.

The complexity of the instructional environment and the choices available (technology, scheduling, etc.) to program designers, instructors, and students contribute to the challenge of an inclusive but not overly broad definition for distance education practice. As noted in Chapter 1, this study prefers a specific term, *distributed education*, broadly defined as (Bow Valley College, 2012):

> …an instructional model which utilizes specialized design and delivery processes so that instruction and learning can occur without instructors and learners necessarily being together at the same place and/or time. It utilizes a range of information distribution and communication technologies—such as print-based materials, audio/videoconferencing, Internet, and other data networks—to enable distributed teaching and learning processes. Distributed learning [or education] can be either the primary modality for the delivery of instruction and services or a complement to and an integrated component of the face-to-face delivery (p. 1).

This term and definition have been purposefully used in this study to be inclusive of the many innovative, non-traditional program designs, delivery strategies, and modalities being explored within Alberta's CCIs—including those employing elements of face-to-face instruction

at multiple locations—in combination with various technologically mediated communication methods. For example, the researcher is currently involved in a pilot delivery project based on the HyFlex (Hybrid Flexible) model similar to that described by Beatty (2007; n.d.) and Mirizaie and Griffy (2016), which allows students to choose at any given time throughout the course their preferred method of participation by attending scheduled in-class sessions, attending scheduled online audio/video sessions, working through course materials posted online, or by combining these methods as they wish. Such blended and otherwise flexible practices still find a place within the stated definition of distributed learning.

**Distance education and consortia**. An important aspect of this study was the prominent role of the eCA consortium in the delivery of online programming amongst the Alberta CCIs—especially as it began to deteriorate during the data collection period. This section briefly reviews the literature on the promise and challenges of consortium approaches to distance education.

The establishment of collaborative post-secondary consortia such as eCA to address issues such as "dropping enrolments in both the public and private sectors, increasing costs, increasing student mobility, and falling public confidence" (Grupe, 1974, p. 135) long predates the advent of online education. However, these same factors combined with the potential for easily creating virtual alliances of PSIs through electronic communication technologies has given rise to a number of consortia designed to promote collaboration, coordination, and efficiency of online programming, typically within state and provincial jurisdictional boundaries (Moriarity, 2013).

In a study of potential benefits and pitfalls of online learning consortia, Anderson, Moxley, Maes, and Reinert (2008) noted that collaborative arrangements allow PSIs to "bring

together their best faculty member(s) in a specialized field with counterparts at similar institutions to rapidly build a new e-learning program that can be offered through each partner institution to a broad audience" (p. 103). They also note, however, that challenges within such alliances arise easily. Common among these are differences in course and administrative policies, quality standards, communication styles, and perceived equity of financial investment and reward. Through a series of brief case studies, these authors point out a number of successful practices for overcoming some of the challenges inherent in consortia relationships.

Rosevear (1999) completed a comparative case study of eight organizations involved in development of a "partnership-based virtual university" (p. 1). Noting many of the same challenges reported by other authors, he proposed that

> No virtual university can hope to succeed without answering these basic questions: How can/should it work with conventional educational institutions? What are the benefits and drawbacks of working with the private sector? How can alliances between education and industry best be managed? How do political pressures influence the development of a state-funded virtual university? (p. 2)

Connolly, Jones, and Jones (2007) suggest that tensions and challenges arise during collaborative efforts due to "differences in aims, language, procedures, culture and perceived power; from the tension between autonomy and accountability and the lack of authority structure; and from the time needed to manage the logistics" (p. 160). In their case study of the collaborative delivery of an online program in the UK, these authors specifically noted themes of management issues, organizational differences, and staff perspectives and communication as significant areas of concern and tension in the effort. A specific example of such issues arose from the fact that the PSIs involved in the collaboration had quite different requirements for

faculty workload, making scheduling of course activities quite challenging. Other challenges arose due to the existing hierarchies at the individual PSIs and the difficulty of subjecting these structures to the overall management of the project. The authors note that these kinds of power issues were eventually overcome through improved communication and a separate project management structure that became acknowledged as the governing authority for collaborative activity.

Most of the above challenges were also discovered in the data from the current study as the challenges of eCA were described by interview respondents. These findings are reported and discussed in Chapters 4 and 5 of this dissertation (below).

**Forces of Change and the Future of Post-Secondary Education**

Writing in his popular higher education blog, Usher (2016) comments somewhat satirically that, "your best bet for imagining what higher education looks like in the future is what it looks like today, only more expensive." Indeed, despite the considerable literature on the imminent impact of disruptive forces on higher education, many colleges and universities have made mostly incremental changes rather than sweeping reforms or innovations. How much longer such incremental change can remain the norm, however, is in question. As Evans and Pauling (2010) indicate in this chapter's opening quote, the rate of technological change and perpetual obsolescence has created a time of genuine uncertainty and risk in the world of distance higher education. This section explores some of the forces likely to play important roles in shaping its future.

**Technology and institutional structure**. Rapid developments in information and communications technology have been both an important driver and an enabler of the rapid expansion of distance education. Predictions of major changes in traditional education systems

have received much attention in the past several years—both in the academic and the popular press.

Annand (2007), drawing on lessons from the history of the Industrial Revolution, points out that, while post-secondary education systems have for years remained highly resistant to changes brought on by technological advancement, this status quo may not last much longer:

> Much like the Industrial Revolution before it, rapid technological change in the Information Age has to date created significant, fundamental change in virtually all sectors of society except education. This may not remain the case for long. A confluence of factors puts increasing pressure on university systems worldwide to change. (p. 6)

Annand further argues that "new learning technologies adopted by appropriately reorganized institutions should be used to create significantly new approaches to the process and management of higher education" (p. 7). Based on their extensive global survey and interview study, Glenn and D'Agostino (2008) expressed conclusions similar to those of Annand. While acknowledging the potential benefits of technology-mediated distance education, they also warn of organizational challenges:

> With these benefits comes the challenge of ensuring that university infrastructure and operations are in place to support the adoption of technology on campus. As ever, administrators will need to weigh carefully how budget funds are spent, decide what emerging technologies show the most promise, and determine how best to support these technological advances while avoiding the ever-present risk of obsolescence (p. 16).

Kamenetz (2010) goes further in pointing out the power that communications networks may have in changing the traditional post-secondary experience, indicating that

> …technology upsets the traditional hierarchies and categories of education. It can put the learner at the center of the educational process. Increasingly this means students will decide what they want to learn; when, where, and with whom; and they will learn by doing. (p. x).

Watson and Watson (2013) believe that higher education systems and institutions are in need of systemic change to develop a new paradigm for post-secondary education based on changes in social and economic needs but most especially due to new technological realities. They argue that higher education, "…is currently undergoing a…transformation from a mass model to a universal model, tasked with adapting the entire population to rapid social and technological change" (p. 43). They emphasize the potential for educational technologies to play a leading role in this transformation, stating, "A new paradigm of higher education will require immense changes to the core processes of higher education, and educational technology will play a central role through the praxis of educational technologists" (p. 43). Significantly, these authors also call attention to some of the unique aspects of post-secondary education which can tend to make its systems resistant to change and offer their opinion that strong central leadership combined with emphasis on thoughtful implementation of technology solutions will be key to necessary transformation:

> Higher education faces unique challenges in implementing systemic change. The largely autonomous and sometimes disconnected nature of faculty can make them more resistant to change, making mindset change more challenging. Furthermore, the closed nature of many institutes of higher education can make them slower to recognize the need for change and less effective in implementing it. A successful systemic change effort will require strong central leadership that is at the same time willing and capable of creating

> the culture of participatory leadership necessary to promote mindset change…. educational technologists are strongly situated to model the sorts of changes that need to occur, to lead the design and integration of new and existing technologies to facilitate the transformation, and to assess and research the creation of a learning organization that is better suited to meet the dynamic and shifting challenges of the information age (p. 46).

**Overview of trends in higher education.** Due to recent rapid changes in social, economic, and technological factors influencing PSIs, numerous authors have sought to define and clarify important trends that these institutions should be aware of as part of their planning efforts. There is much overlap in the ideas and issues presented by authors covering this topic, and the following list is drawn largely from the work of Berrett (2015), Cronin (2006), Howell, Williams, and Lindsay (2003), Peppers (2016), Regehr (2013), Supiano (2015), Toner (2017), and Young (2015), with additional citations provided to identify unique or further contributions.

- Student demographics and preferences are shifting, leading to new patterns of student behaviour and expectation. In general, PSIs are seeing increasingly diverse populations in age, ethnicity, gender, employment and family status. This change in demographics tends to drive demand for more flexible, student-focused programming options. Howell, Williams, and Lindsay (2003) note that "today's adult learners differ still from traditional college-age students. They tend to be practical problem solvers. Their life experiences make them autonomous, self-directed, and goal- and relevancy-oriented….Their demands include time and scheduling, money, and long-term commitment constraints" (p. 3).
- Various forms of "unbundling" are taking place, meaning that roles and services once considered part of a larger package within PSIs are being separated and offered

on demand. Young (2015), described the trend toward "unbundling" of college courses and services as affecting programs and courses—which might be converted into smaller "chunks" to be packaged into "micro-degrees" (p. B25), as well as access to traditional services such as recreational facilities and libraries, which could be offered on an "à la carte" basis.

- Faculty roles require additional support to cope with rapid changes in technology and resulting demand for changes in program delivery and pedagogy. In addition, unbundling of courses and services combined with distributed (i.e., online) delivery is changing traditional faculty and staff roles, workloads, and collective bargaining assumptions. Berrett (2015) discussed the resurgence of teaching and learning scholarship within PSIs, linking this development to faculty professional development needs in response to new forms of online learning delivery.
- Competition from private interests focused on alternative forms of program delivery and credentialing (e.g. MOOCs, coding boot camps) is increasing (Berrett, 2015; Cronin, 2006).
- Increasing political, social, and technological complexity is making it more challenging to maintain effective centralized post-secondary governance (Peppers, 2016) and traditional organizational structures (Howell et al., 2003).
- Post-secondary participation in Canada has risen while funding for PSIs from local governments is shrinking (Regehr, 2013). At the same time, these government funders are becoming more concerned and watchful regarding the quality of the learning and graduate employment outcomes produced by these institutions (Regehr, 2013). Supiano (2015) described the growing need for colleges to pay more

attention to students' career planning and to increase resources directed toward linking students with employers. Weaver (2017) described the much-discussed "skills gap" between college graduates and the needs of the workforce, suggesting that the challenge is not so much lack of skills as it is lack of coordination between PSIs, employers, and governments to ensure that rapidly changing workplace requirements are reflected in post-secondary programming.

- The sophisticated use of information technology to deliver and support flexible, distributed programming, as well as tightly integrate the administrative and service experience, has become a near ubiquitous expectation. Toner (2017) emphasized the need to use social media and other popular mobile communications channels to interact with students. Peppers (2016) and Berrett (2015) discussed the central role of instructional and communication technologies in meeting the expectations of current and future students.
- The comparative ease of offering distributed learning using the Internet has led to increased competition across traditional geographic and jurisdictional boundaries with resulting disruption of long-standing institutional systems. Howell, Williams, and Lindsay (2003) note that within some PSIs and jurisdictions, "Traditional [residency classifications] and international student distinctions are being eliminated, and the corresponding fee structures for the respective groups are breaking down" (p. 12).

**Approaches and Methods for Planning**

The topic of organizational planning in general has been extensively discussed in the literature, much work devoted to planning in higher education and a substantial though smaller

body devoted to planning for distance education. This section provides an overview of such planning literature, which was instrumental in shaping this study and informing the development of the conceptual framework for planning of distributed education matched to the Alberta CCI context.

**General approaches to organizational planning**. Many authors have contributed to the literature in this field, given its applicability to almost every aspect of organizational activity. The purpose of this section is to review some of the key concepts, and especially methods, generally used in planning for organizational activity.

As described in Chapter 1, planning can be thought of as the process of developing methods or schemes in preparation for their implementation and has long been considered one of the fundamental activities of management—along with organizing, leading, commanding, and controlling (Clegg, Clegg, & Bailey, 2007). Mintzberg (1994) adds that a central characteristic of planning within organizations is formalization, stating that:

> …planning is a formalized procedure to produce an articulated result, in the form of an integrated system of decisions. What to us captures the notion of planning above all—most clearly distinguishes its literature and differentiates its practice from other processes—is its emphasis on formalization, the systemization of the phenomenon to which planning is meant to apply (p. 12).

Lisiński and Saruckij (2006) reviewed the planning literature to determine the principles of planning methods in common use, as well as to classify them according to application. From a large body of planning methods described in the literature, they chose 28 as representative of important approaches, and classified these into four types based on complexity, specificity of outputs, and the organizational preparedness required to implement each method. An important

finding of their study is that relatively few organizations engage in systematic planning using formal methods. This was likely due to the complexity of many such planning methods and the related need for organizational sophistication and resources to engage successfully in them.

In a study of planning methods and outcomes in a public sector organization, Al Darmaki (2016) discussed the challenges such organizations face in applying planning methods originally designed for use within a private, for-profit setting. He found that, within his study, issues such as mismatched organizational structure, ineffective communications, lack of accountability and, most especially, poor internal coordination all contributed to difficulty in planning and implementation. The author argues that a key factor in improving planning processes and outcomes in public sector organizations is focus on the development of professional managerial skills that enable these staff members to view the organization from a more holistic, future-oriented perspective. He states, "Managers are key actors in various processes and therefore practices that are being followed and the results of those practices are directly impacted by the way managers envision the future of the organisation" (p. 94).

Christensen's (1997) seminal book on the nature of disruptive innovation provided a novel way of looking at and planning for change within organizations and markets. This work demonstrated the tendency of new—often imperfect—technologies and practices to rise to prominence by gaining a foothold with clients who are not able to use existing mainstream offerings (often due to high costs). For these individuals, the imperfect but affordable offering is better than the only alternative—nothing at all. Established players in an industry are often unable to adapt to these innovations, even when they are aware of them, because their infrastructure and business models are so dependent on established practices. In time, innovative practices become refined by early adopters and suitable for mainstream users, often

supplanting earlier solutions and providers over a very short time. The dilemma facing established players in planning the direction of their organization is how to best innovate to remain relevant in the long-term without undercutting their existing value proposition.

The researcher's own review of planning related literature revealed that, while many specific methods of conducting planning have been articulated, three (including multiple variants of each) stand out as the most commonly employed—especially in educational organizations: 1) SWOT analysis, 2) SOAR analysis, and 3) scenario planning.

***SWOT analysis***. A SWOT analysis is an "examination of an organization's internal strengths and weaknesses, its opportunities for growth and improvement, and the threats the external environment presents to its survival" (Harrison, 2016, p. 92). This is almost certainly the best-known and most commonly used planning method—both in the literature and in the researcher's professional experience. The acronym SWOT stands for the four terms: 1) strengths, 2) weaknesses, 3) opportunities, and 4) threats, and the method has its origins in work conducted at the Harvard Business School as early as 1957 (Mintzberg, 1994).

SWOT analyses are often conducted in group settings but can be implemented through a wide variety of methods. Essentially, participants are asked to consider and provide feedback on the following areas of consideration, the collected information is compiled, and individuals or teams formulate plans based on the analysis (Garner, 2005; Mintzberg, 1994; Reimer, 2017).

- **Strengths** describe the existing positive attributes of an organization—usually those that are internally controlled or produced. Participants often answer questions such as, "What does the organization do well?", "What resources are currently available?", or "What advantages does the organization have over competitors?"

- **Weaknesses** describe the internal challenges of the organization—areas that are known to be weak and that are under the control of the organization. Participants often answer questions such as, "What expertise is missing from our organization", or "Is our technology infrastructure sufficient to deliver on our clients' expectations?"
- **Opportunities** describe the potential for new, increased, or superior activity in the organization's external operating environment. Participants are often asked questions such as, "What new activities or initiatives could further the organization's mission?", "How could we add value to existing services", or "What challenges do our clients and potential clients face that we might assist them to solve?"
- **Threats** describe the issues and trends external to the organization which may be detrimental to its success and which may be partly or completely beyond the organization's control. Participants are often asked questions such as, "What will be the impact of current demographic trends on our client base?", "How might new communications technology disrupt or current business model?", or "How might a change in government impact our funding situation?"

While popular and easily implemented, SWOT analysis has faced criticism as a method for planning, which has led to the proposal of several modified versions of the basic approach. Agarwal, Grassl, and Pahl (2012) review criticism of the method, noting that it "relies on subjective intuitions, is unsystematic, eschews quantification, and lacks predictive power" (p. 12). Still, these authors argue that the method has value, stating:

> Yet the basic intuition behind SWOT analysis appears to be sound. It assumes that successful strategies are based on a good fit between internal resources and external

> possibilities. Distinctive capabilities and competencies of organizations must ‘‘hook onto’’ factors in the political, economic, social, technological, and regulatory environments that require and support such competencies. There is much evidence that a strong fit between context and resources positively impacts performance (p. 12).

To address the challenges of the traditional SWOT approach, these authors suggest an updated approach they term “meta-SWOT,” which seeks to collect input for each of the four SWOT categories not only through subjective participant input but also through explicitly designed and quantified measures that can then be subjected to ratings and weightings based on objective internal and external data.

Similarly, Al-Araki (2013) noted the potential shortcomings of SWOT, but rather than proposing a highly quantified revision of the method as a remedy, he suggests a model which includes two additional information gathering frameworks—PEAK and SETS—that can be combined and compared with SWOT outputs to form a more complete basis for organizational planning.

- PEAK refers to 1) Power, including authority and empowerment; 2) Earnings, including economic and sociopsychological gains or losses; 3) Artistry, including skills, performance, and ways of doing things; and 4) Knowledge, including science and technology (p. 616).
- SETS refers to 1) Strength or solidness of a thing or a phenomenon; 2) Extent or significance of size of the thing or the phenomenon; 3) Type, sort, or gender of the thing or the phenomenon; and 4) Segment, specialisation, or sector of the thing or the phenomenon (p. 617).

Al-Araki's method, like that of Agarwal, Grassl, and Pahl, is a more complex undertaking than many more standard SWOT approaches but offers a more rigorous, less subjective basis for organizational planning by collecting additional information and by introducing a framework for assessing and weighting that information for impact on the final plan.

***SOAR analysis***. A more recently developed but still commonly cited planning method is SOAR analysis, standing for 1) strengths, 2) opportunities, 3) aspirations, and 3) results. This method, with roots in the appreciative inquiry approach (Zarestky & Cole, 2017), is implemented in a similar fashion to SWOT but is intended to counter what some perceive as SWOT analysis' focus on deficits by encouraging a "focus on aspirations and results, pushing the [organizational development] process toward hopeful possibilities and concrete outcomes" (p. 6).

Appreciative inquiry developed out of the positive psychology and "strengths" movement beginning in the late 1980s and emphasizes an approach to organizational development that avoids concentrating on problems that must be corrected or fixed, instead focusing on the existing positive attributes of an organization and how these might be enhanced (Godwin, 2016). Appreciative inquiry practitioners "advocate for asking questions that emphasize participants' positivity, optimism, and strengths" (Zarestky & Cole, 2017, p. 8). In contrast to SWOT, SOAR is intended to be aspirational and action oriented, focused on possibilities rather than on competition, and designed to enable innovation and breakthroughs rather than incremental improvements (Zarestky & Cole, 2017).

Despite the enthusiasm of its supporters, SOAR methods are criticized for their shortcomings. In an invited response to Zarestky and Cole, McLean (2017) critiques SOAR

methodology specifically and appreciative inquiry generally as approaches to organizational planning and development, citing the following four areas of concern:

1. Lack of systems thinking in positive psychology and appreciative inquiry, which can lead to a lack of attention to difficult or negative issues that should be addressed.
2. Lack of efficacy (along with SWOT) associated with traditional planning as both methods encourage static "snapshot" approaches to planning when most environments demand more dynamic approaches.
3. Failure of the results orientation of SOAR to sufficiently address underlying systems and processes that must be continually improved to realize lasting success.
4. Inability to identify the necessary data to support either SWOT or SOAR, as both depend on knowledge of environmental factors that are difficult to understand with certainty—such as rapid changes to technology, as yet unreleased competitor plans, etc.

***Scenario planning***. The final general approach to planning covered in this review is known as scenario planning and has gained considerable attention as a means of conducting thought experiments to imagine potential outcomes based on known conditions. Various forms of this approach are popular amongst those seeking to plan further into the future, and elements of it are found throughout works by noted popular press futurists such as Cornish (2004) and Sommers (2012).

Brauers and Webber (1988) described scenarios as "description[s] of a possible future state of an organization's environment considering possible developments of relevant interdependent factors in this environment" (p. 32) and scenario planning as a qualitative approach to examining such possible future states that then allows planners to "synthesize

quantitative and qualitative information, constructing multiple scenarios or alternate portraits of the future" (p. 32). These authors outline the following four broad stages in the development of scenarios for planning (adapted from p. 33):

1. Determine an exact definition for the object of the investigation to ensure all participants in the analysis have a shared understanding of the problem.
2. Further structure the agreed problem by determining its subsystems and identifying relevant environmental influences on the object under investigation.
3. Define possible development paths of the environmental influencing factors from the previous stage.
4. Consider the existing interdependencies between the environmental factors and establish alternative scenarios through the synthesis of these different future states.

The authors also include considerable detail on precisely how to implement these stages to ensure a highly rigorous scenario development process that includes comparison of, and quantitative probability assessment for, different outcomes.

Wade (2012), in his extensive treatment of the scenario planning process, advocates the use of scenarios as a means of avoiding organizational plans that "implicitly consider the future as an extrapolation of the present" (p. 08). His position, somewhat in contrast to that of Brauers and Webber, is that scenario planning provides a means not so much of rigorous analysis but rather a method by which multiple possible futures might be imagined and flexible plans developed for dynamic implementation as the future unfolds.

He lays out a 10-step approach to his conception of scenario planning:

1. Frame the challenge
2. Gather information

3. Identify driving forces
4. Define the future's critical "either/or" uncertainties
5. Generate scenarios
6. Flesh out the scenarios to create story lines
7. Validate the scenarios and identify further necessary research
8. Assess the scenario implications and define possible responses
9. Identify signposts (i.e., indicators that a particular anticipated scenario is beginning to emerge)
10. Monitor and update the scenarios over time

Despite the advantages noted for scenario planning methods, other authors have noted that they present challenges and drawbacks as well. Roxburgh (2009), for example, notes several common pitfalls related to scenario planning. Most significantly, scenario approaches can lead at one extreme to a fixed mentality about how the future should unfold, and on the other to an overly complex set of possibilities and outcomes that prevent action due to constant uncertainty and difficulties in making and communicating decisions. He recommends that four scenarios based on two or three different variables are likely an appropriate "rule of thumb" when employing scenario planning methods.

**Planning approaches and methods specific to post-secondary institutions and distributed education**. Though not so voluminous as the general organizational planning literature, a still extensive body of work exists describing planning and related management practices within higher education. This section provides an overview of such sources, focusing on those most related to distributed education.

Voohees (2008) examined planning within the PSI context and advocated for combining quantitative and qualitative methods to obtain the most effective results, stating that the "quantitative paradigm helps…to describe the 'what' in an organization, while the qualitative paradigm can answer the 'why'" (p. 5). He particularly encouraged the qualitative practice of competitor analysis by compiling detailed profiles of other PSIs that might draw from the same potential student population as the "basis for creating new programs or modifying existing programs that can form a market niche" and to identify "programs that may be redundant within either the geographical space within which the institution competes for students or wider markets in which the institution competes" (p. 8).

Alfred (2006), in providing a book-length overview of issues in college management, describes the challenge of developing an integrated and cohesive plan within the unique, complex, competitive, and highly dynamic post-secondary environment. This author emphasized the importance of understanding the institutional and environmental context when undertaking a planning process and suggests that important dimensions of institutional readiness for change include awareness, distinctiveness, focus, and urgency. He describes in detail an approach to institutional planning that "emphasizes a big-picture approach to management, a keen awareness of stakeholders and competitors, an appreciation of the importance of [stakeholder] value, a commitment to differentiation, a continuing quest for advantage, and a sense of urgency about the future" (p. 260). Specifically, he encourages post-secondary leaders to consider six questions about the readiness of their institutions for organizational change (p. 261):

1. Are faculty and staff familiar and conversant with trends, forces, and opportunities in the external environment—do they see the big picture?

2. How much do they know about competitors and what they are doing or apt to do—are they focused on competitors?
3. Are they interested in innovative practices in institutions and organizations outside of this college—do they have a curiosity about other organizations?
4. Are they familiar with the concept of "value"—do they look at their work in terms of the benefit it creates for stakeholders?
5. Are they interested in being different, distinct from, or better than other institutions they are conscious of, and committed to, advantage?
6. Do they possess a sense of urgency about the future?

Haughey (2003), a former Athabasca University vice-president, discussed planning for flexible learning systems and noted "the pressures facing postsecondary institutions and the need to undertake a planning exercise to address this challenge" (p. 54). She observes that, although PSIs have previously been somewhat outside the realm of larger economic activity within society, they now face pressure from both governments and the public to "provide more research to support the transfer from resource-based to information industries, and to produce science and technology graduates who would be equipped to work in such a sector" (p. 54). She further suggests, based on the work of Peterson and Dill (1997), that the post-secondary education sector is no longer separate from other economic sectors and that PSIs should begin to see themselves as contributors within a comprehensive knowledge industry and that this requires PSIs to pay more attention to their external environment when planning.

Citing especially the often-disruptive effect of rapid developments in information technology and communication systems, Haughey recommends PSIs engage in "contextual planning [which] seeks to know how the environment is changing and how we can reposition

aspects of our institution within that environment and then what we need to do to reshape our institution to ensure our continued viability" (p. 58). She further notes that the changes required of PSIs by such a dynamic environment are likely to be fundamentally transformative rather than incremental, directly impacting faculty and their instructional practice, and argues that a contextual planning approach

> …acknowledges the fundamental importance of culture and…provides opportunities for the contributions of academics in the delineation of the change. It suggests that providing opportunity for experimentation may be more positive and creative than establishing a set of objectives and then focusing on implementation. If academics view the move to transformation of the instructional system as the imposition of technology they are unlikely to support the venture. Instead, since there is no single best blueprint, faculty should be encouraged to develop a number of different projects to address the issues of student flexibility, enhanced learning options, and institutional responsiveness (p. 60).

Bates and Sangra (2011) explored the challenge of managing technology in higher education as part of addressing the need for a well-considered plan in order to implement meaningful integration of technology solutions related to distributed education in PSIs. These authors caution, however, that such "planning has a bad reputation (particularly among academics)" (p. 94) and echo Haughey's (2003) advice that such plans must be developed and implemented in close association with instructors and others who will be called on to actually use the technology in question.

Minnaar (2013) explored the issues involved in planning for distance education programs and proposed an initial template for planning based on a review of relevant literature.

She notes that, while inadequate planning in general is often a factor in failure of distance education initiatives at traditional face-to-face institutions, it is sometimes more the case that there has been a "failure to ensure that all the different systems for [distance] delivery were in place and functioning" (p. 81). She reports that this template analysis indicates that a gap exists in the literature for the planning of distance education and goes on to suggest an extensive list of considerations and issues gathered from the literature and grouped into four top-level categories 1) strategy, 2) policy, 3) systems, and 4) challenges. This author further notes that there is "infinite potential for overlap and interplay between strategy, policies, and systems which are influenced by challenges" (p. 103), highlighting the challenges inherent in analyzing and describing complex, interconnected systems such as distributed education.

Pisel (2008; 2001) developed a 10-phase process model specifically designed to address issues in planning for distance education that included a SWOT analysis with an expert panel to determine important areas of consideration both internal and external to PSIs engaged in such a planning process. He reported seven internal issues related to strengths and weaknesses: 1) Institutional Assessment, 2) Leadership, 3) Academic Programs, 4) Funding, 5) Mission, 6) Infrastructure, and 7) Stakeholders. He also reported seven external issues related to opportunities and threats: 1) Market, 2) Competition, 3) Partnerships, 4) Customers, 5) Politics, 6) Technology, and 7) Stakeholders. Invoking some of the same concerns expressed by Alfred (2006), he notes that post-secondary education has become an increasingly complicated and competitive sector requiring that institutions pay greater attention to planning processes, especially when undertaking innovations such as distance education.

Pisel's work, though following different methodology, served as one of the inspirations for the current study, as the researcher was interested to see if the same kinds of issues would

emerge from data gathered within Alberta's post-secondary system; how such issues might be described and interpreted within the specific economic, social, political, and historical context of the province's post-secondary system; and what role they might (or might not) play in a conceptual framework discovered from data grounded in the Alberta CCI context. As the only study found with a directly comparable goal to that of the current study, it also afforded this researcher an opportunity to partially replicate and extend Pisel's work to another context several years removed from the work he described.

**Summary**

This chapter reviewed literature relevant to the proposed study. It covered three broad areas with the intention of linking the current study to previous work and providing sufficient background to assist readers to understand the starting point of the study: planning in distance education. First, it demonstrated that distance education has a lengthy history of both practice and theoretical development and that this history is tightly intertwined with the development of information and communication technologies. As part of this history, it described the various phases of distance education development, including the development of accepted definitions in the field and its frequent association with attempts at consortium approaches to education delivery.

Second, it described the forces of change currently at work in post-secondary education and related emerging trends. Key to this discussion was the link between technological changes and the new forms of educational practice they enable and how these changes conflict with and potentially disrupt traditional roles, structures, and assumptions within PSIs.

Third, the chapter reviewed approaches and methods for organizational planning, especially those applications that might be used to support planning for distributed education. It

specifically examined SWOT, SOAR, and scenario-based approaches to planning, discussing advantages and disadvantages for each. The chapter concluded with a review of the few studies similar to the one reported here and how they influenced the researcher's work.

The next chapter describes the methodology employed in the study, including its theoretical underpinnings along with the specific approaches and procedures for data collection and analysis.

# Chapter 3

## Research Methods and Theoretical Perspectives

"You don't have to know everything to understand something."

L. S. Shulman (1981)

This chapter introduces grounded theory as the intended methodology for the proposed study. It reviews the history of this methodological tradition, important philosophical underpinnings and assumptions, and core elements of its implementation as a rigorous research methodology. It concludes with an overview of the data-gathering and analysis procedures used during the study.

### Theoretical Perspectives, Assumptions, and Underpinnings

The researcher first encountered Shulman's (1981, p. 12) statement, "You don't have to know everything to understand something" while completing his master's degree in distance education. Attractive partly because of its pithy quality, it has become one of the researcher's key expressions of orientation toward his own research—that complex human systems (like distributed education) may be impossible to understand fully, but that does not mean we cannot correctly and usefully understand them in part through appropriately rigorous research methods.

The decision to pursue a grounded theory approach to this study was based on the "fit" of the methodology with the initial research questions and their context as articulated in Chapter 1:

1. What are generally accepted practices for planning, and how well do they fit the context of planning for distributed education delivery within an Alberta CCI?

2. What planning methods and frameworks already exist within the field of distance or distributed education (or other related areas of practice), and to what degree do they inform or assist the planning process undertaken in the Alberta CCI context?
3. What do senior leaders within Alberta CCIs and the larger Alberta post-secondary system consider key issues and considerations in developing a plan for distributed education delivery?
4. What cultural and procedural shifts are required to enable effective distributed education practices within Alberta CCIs, and how do these issues affect the planning process?

Further, the grounded theory approach proved an appropriate match with the researcher's own philosophical orientation and affinity for a "bricolage" approach to research.

First described in the work of Claude Levi-Strauss, a bricoleur is (Maxwell, 2012) "someone who uses whatever tools and materials are at hand to complete a project…creatively employing the available tools and materials to come up with unique solutions to a problem" (p. 42) rather than relying on a rigidly designed plan and tool set. This approach to research requires a flexible methodology such as grounded theory that can accommodate multiple and diverse data sources introduced over the course of a study.

Grounded theory has been successfully employed by researchers of both objectivist and constructivist orientations (Charmaz, 2006). The ability to accommodate these differing perspectives within a single methodology is important to this author, who has adopted a philosophical position known as critical realism, which may be seen as "a middle way between empiricism/positivism on the one hand, and anti-naturalism/interpretivism on the other, thus introducing a more nuanced version of realist ontology" (Zachariadis, Scott, & Barrett, 2013).

Maxwell (2012) notes that such a position is itself a form of bricolage in that it seeks to combine two seemingly incompatible perspectives: ontological realism and epistemological constructivism.

At one end of this philosophical continuum, ontological realism holds that "that there is a real world that exists independently of our perceptions and theories" (Maxwell, 2012, p. 856). At the other end of the continuum, epistemological constructivism recognizes that "Our understanding of this world is inevitably our construction, rather than a purely objective perception of reality, and no such construction can claim absolute truth" (Maxwell, 2012, p. 856). Constructivism is a complex construct and discussed further below.

The researcher tends to agree with Tsoukos (2000) that these positions represent a false dichotomy:

> Both sides of the argument do have a point. Realists are right in saying that there is a social world outside our heads. Constructivists are right in claiming that the social world is constituted by language-based distinctions which are socially defined and established. Both sides can be reconciled if it is accepted that social reality is causally independent of actors (hence realists have a point) and, at the same time, what social reality is depends on how it has been historically defined, the cultural meanings and distinctions which have made it this reality as opposed to that reality (hence constructivists also have a point). Thus, bearing in mind that the causal independence of the world is different from the latter's description helps us uphold both the ontological existence of, and the epistemological diversity towards, the world (pp. 531–532).

A critical realism orientation is by no means prerequisite to employing grounded theory. Indeed, orientations as far ranging as Marxism, pragmatism, feminism, and post-modernism

(among others) are cited by prominent proponents of grounded theory (Charmaz, 2006; Corbin & Strauss, 2008) as compatible with grounded theory methods.

For this researcher, grounded theory represents the best methodological fit for a complex—even messy—contextual reality that must acknowledge and incorporate data from sources as diverse as institutional and provincial budgets, internal and external organizational relationships, differing ideological orientations amongst key players, political imperatives, formal and informal power structures, labour relations, individual fears regarding job security, and many others.

**Grounded Theory Methodology**

Grounded theory has been elaborated into a number of distinct approaches since it was first described by Glaser and Strauss in 1967 (Charmaz, 2006). At its core though, grounded theory can be described as a "set of techniques which emphasize the creation of theoretical statements from the inspection of data, largely gathered in qualitative observational studies" (Seale, 2012). Charmaz (2008, p. 507) states that grounded theory methods are essentially "a set of flexible analytic guidelines that enable researchers to focus their data collection and to build inductive middle-range theories through successive levels of data analysis and conceptual development."

Grounded theory methodology is characterized by simultaneous and repeated rounds of data collection and analysis to inductively build theory based on emerging themes. The researcher "cycles between episodes of data collection and data analysis, the one informing the other, so that the eventual research report is very likely to exhibit good concept-indicator links" (Seale, 2012, p. 393).

While numerous specific techniques are described for conducting grounded theory investigations (Charmaz, 2006; Corbin & Strauss, 2008), Seale (2012) states that all share three core concepts:

- Theoretical sampling is the process of "continual re-examination of data in light of developing arguments" (p. 395). Through this method, the researcher uses the emerging concepts and themes from the data to help choose what additional data might be required to provide a more complete description of the phenomena of interest.
- Theoretical saturation is the criterion for judging when to stop sampling from data sources related to a specific concept or theme. This point is said to be reached when it becomes apparent that new data no longer allow the researcher to identify new properties within a concept.
- Constant comparison is a rigorous method for coding data to find common categories and concepts. By repeating this process, revisiting past data sets as new data becomes available, the researcher is able to integrate the categories and their properties to arrive at theoretical statements regarding the observed phenomena.

The study follows established guidelines for analysis of data through various coding techniques (Corbin & Strauss, 2008; Saldana, 2013) along with methods that lend a constructivist element to the analysis (Charmaz, 2006). Most specifically, Jabareen's (2009) method for developing conceptual frameworks using grounded theory was employed and is discussed in greater detail later in this chapter.

**Objectivist versus constructivist grounded theory**. A number of authors, notably Charmaz (2008), have commented on the implicit objectivist and positivist underpinnings of

early grounded theory methodologies. In response, more explicitly constructivist formulations of grounded theory have been described that better address the need to include both investigator and participant bias and perceptions of reality within the scope of an investigation.

Charmaz (2008, p. 509) states:

> A constructivist grounded theory adopts grounded theory guidelines as tools but does not subscribe to the objectivist, positivist assumptions in its earlier formulations. A constructivist approach emphasizes the studied phenomenon rather than the methods of study…It does not assume the data simply await discovery in an external world or that methodological procedures will correct limited views of the studied world. Nor does it assume that impartial observers enter the research scene without an interpretive frame of reference. Instead, what observers see and hear depends on their prior interpretive frames, biographies, and interests as well as the research context, the relationships with research participants, concrete field experiences, and modes of generating and recording empirical materials. No qualitative method rests on pure induction—the questions we ask of the empirical world frame what we know of it. In short, we share in constructing what we define as data.

Henriques (1997), in discussing constructivist learning theory, describes the various ways that constructivist thought might be interpreted along a continuum from more absolute or positivist views of knowledge at one pole to more interpretive or relativist views at the other. This researcher largely adopts Henriques's (1997) description of "interactive constructivism" (p. 21), accepting that individuals, "construct knowledge and learn when they are able to interact with other people and their surroundings" (p. 21) and that "meaning is made when [individuals] reflect and make sense of their interactions (p. 21). However, he also incorporates the idea of

social constructivism, that "knowledge is created at the community level via interactions of individuals within a society" (p. 24).

Taking the view that grounded theory methods exist along a continuum with objectivist and relativist views at the extreme poles, this study aims to describe reality as constructed by the investigator through his experience in the Alberta post-secondary system, review and analysis of relevant documentary data, and most especially through conducting and analyzing interviews with qualified respondents. Rather than claiming purely objective data gathering and interpretation, the approach was to acknowledge the background, assumptions, and potential biases of all participants—especially the researcher himself. At the same time, constant comparisons were made across all the data sources and especially between the phases of the study to reveal patterns of consensus regarding the most useful shared and unique realities. In this way, the study may be seen as oriented between the philosophical extremes of objectivism and relativism, reporting and analyzing the constructed realities of participants while still addressing issues of validity and generalizability—even if only through the perceptions of many participants with different perspectives.

**Methodological rigor in grounded theory**. Seale (2012, p. 393) describes "concept-indicator links"—or the demonstration of evidence for theoretical concepts—as an important goal of both qualitative and quantitative research. He states that grounded theory methodology especially facilitates demonstration of such links as "it is based on creating new concepts and ideas and the relations between them…from observations of social settings" (p. 534) and that as a result, "research reports based on grounded theorizing generally exhibit excellent links between concepts and the examples drawn from data" (p. 534), which might be considered a form of measurement validity.

Cooney (2011) explores and defends the rigour of grounded theory methodology, invoking Beck's (1993) criteria for demonstrating rigour in qualitative research studies—credibility, auditability, and fittingness—and providing examples for how grounded theory addresses each:

- *Credibility* relates to how well the observations and theoretical statements resonate with those involved in the study. In grounded theory, "credibility is…evident when others, such as researchers or practitioners, can recognise the experience when they encounter it, having only read about it in a study" (p. 19).
- *Auditability* refers to the need for an audit trail of documentation, "maintaining a comprehensive record of all methodological decisions, such as a record of the sources of data, sampling decisions, and analytical procedures and their implementation" (p. 20).
- *Fittingness* (also referred to as transferability) might be thought of as a theory's generalizability and is "concerned with demonstrating that the findings have meaning to others in similar situations" (p. 21) and "dependent on the degree of similarity between two contexts" (p. 21). A grounded theory will have greater fittingness or generalizability "if the data on which it is based are comprehensive and the interpretation conceptual and broad. This will increase the potential of the theory to be applicable in different but related contexts" (p. 22).

Discussing rigour in qualitative research generally, Creswell (2003) describes the importance of including both ample evidence in the form of participant quotations from the data as well as clear indications of how those examples are linked together, thus emphasizing Seal's

(2012) focus on the explicit provision of "concept-indicator links" (p. 393). Creswell further stresses the need to provide sufficient detailed description of researcher observations, comparison of data from various sources, and presentation of data that is "discrepant…that runs counter to the themes" (p. 196).

Morrow (2005, p. 251), in a synthesis of concepts related to quality and trustworthiness in qualitative research, compares concepts of rigour between qualitative and quantitative research methodologies and explains that the term "…*credibility* in qualitative research is said to correspond with concepts of *internal validity* in quantitative approaches, *transferability* to *external validity* or *generalizability*, *dependability* to *reliability*, and *confirmability* to *objectivity*. However, she also notes that such correspondences

> …should not be taken to mean that these parallel criteria accomplish exactly the same goals as their corresponding standards of rigor in quantitative research. Qualitative research leads to different kinds of knowledge claims than those resulting from the use of quantitative methods. For example, qualitative research is idiographic and emic (focusing on one or a very few individuals, finding categories of meaning from the individuals studied) as opposed to nomothetic and etic (focusing on standardized methods of obtaining knowledge from large samples of individuals, using categories taken from existing theory and operationalized by the researcher (p. 252)

This study was designed to allow for data collection using established and accepted methods from multiple sources, over sufficient time, and with adequate documentation and verification to satisfy these criteria for rigour in grounded theory research. Further discussion of how this study met the burden of rigour is provided in Chapter 5.

**Research Process**

The purpose of the study was to develop a conceptual framework for planning distributed program delivery at Alberta CCIs that is grounded within the examined data. As noted, the study used qualitative methods based on the conceptual framework analysis technique described by Jabareen (2009), a specific grounded theory approach that aims to generate, identify, and trace a phenomenon's major concepts, which together constitute its theoretical framework. This technique was key to the study in that it provided a concrete application of grounded theory that assisted the researcher in structuring the study and provided an example of how a conceptual framework might be derived from qualitative data.

Conceptual framework analysis aims to "develop concepts—each of which has its own attributes, characteristics, assumptions, limitations, distinct perspectives, and specific function within the conceptual framework—that shed more light on the phenomenon represented by the concepts themselves. At the heart of this methodology lies the interplay among induction, derivation of concepts from data, and deduction aimed at hypothesizing the relationship between concepts" (Jabareen, 2009, p. 53). Jabareen further suggests that data for conceptual framework analysis should "represent the relevant social, cultural, political, and environmental phenomenon or social behavior, and the multidisciplinary literature that focuses on the phenomenon under study" (p. 53) while also representing practices that are related to the phenomenon. The data should therefore be broadly sourced "from a variety of types, such as books, articles, newspapers, essays, interviews, and practices" (p. 53). Such a strategy facilitates an inductive or "data-driven" (Brinkmann, 2014, p. 721) approach to theory building by moving from specific observations to broader generalizations.

Table 4 outlines the suggested phases for a conceptual framework analysis study along with comments on how they were followed during this study. While each phase was considered, some (phases 7 and 8) proved beyond the scope of the study, and many others were completed in an overlapping and sometimes iterative fashion. The specific research questions, data sources, and methods are described later in this chapter—along with a description of how the study deviated in some respects from the original project proposal.

Table 4

*Phases of Conceptual Framework Analysis*

| Phase | Description from Jabareen (2009) | Application to Study |
|---|---|---|
| **Phase 1: Mapping the selected data sources** | ▪ Identifying text types and other sources of data, such as existing empirical data and practices<br>▪ Extensive review of the multidisciplinary texts<br>▪ Interviews with practitioners, specialists, and scholars from various disciplines whose work focuses on the targeted phenomenon | ▪ Identified data sources associated with each research question, including books, articles, government documents, and records of personal observations<br>▪ Conducted and transcribed interviews with identified respondents<br>▪ Reviewed data sources to identify and gaps or omissions suggested during this phase |
| **Phase 2: Extensive reading and categorizing of the selected data** | ▪ Read the selected data and categorize it both by discipline and by a scale of importance and representative power within each discipline | ▪ These activities were combined with those described in Phase 3. |
| **Phase 3: Identifying and naming concepts** | ▪ Read and reread the selected data and “discover” concepts<br>▪ Develop a list of numerous competing and sometimes contradictory concepts, | ▪ Relevant portions of all collected literature and all interview transcripts were reviewed by the researcher to reveal common themes |

| | | |
|---|---|---|
| | allowing concepts to emerge from the literature | and understandings to inform later theory development. |
| **Phase 4: Deconstructing and categorizing the concepts** | ▪ Deconstruct each concept to identify its main attributes, characteristics, assumptions, and role.<br>▪ Organize and categorize the concepts according to their features and roles. | ▪ These activities were combined with those described in Phase 5. |
| **Phase 5: Integrating concepts** | ▪ Integrate and group together concepts that have similarities to one new concept, to drastically reduce the number of concepts and allow manipulation of a more reasonable number of concepts. | ▪ Data from selected literature and all interviews were coded and analyzed using MAXQDA, qualitative analysis software specifically designed for this purpose (see Chapter 4).<br>▪ As data were coded and analyzed, the researcher received feedback from colleagues on perceptions and interpretations of these codes<br>▪ While it was not possible to review and code every part of every relevant document considered, due to practical constraints of time and project scope, coding and analyzing was considered complete when theoretical saturation was reached, meaning "fresh data no longer sparks new theoretical insights, nor reveals new properties of…core theoretical categories" (Charmaz, 2010, p. 113). |

| | | |
|---|---|---|
| **Phase 6: Synthesis, resynthesis, and making it all make sense** | ▪ Synthesize concepts into a theoretical framework.<br>▪ Process is iterative and includes repetitive synthesis and resynthesis until the researcher recognizes a general theoretical framework that makes sense. | ▪ Development of a conceptual framework was completed for planning of distributed education delivery within Alberta CCI's along with discussion of the framework as an emerging substantive theory—discovered and grounded within the literature and collected data (see Chapter 4). |
| **Phase 7: Validating the conceptual framework** | ▪ Validate the conceptual framework, asking whether the proposed framework and its concepts make sense not only to the researcher but also to other scholars and practitioners. | ▪ Validation of the completed conceptual framework is beyond the scope of the study but represents an important next step toward application.<br>▪ The researcher provides discussion and recommendations for further development toward a more generalized theory and its potential application in Chapter 5. |
| **Phase 8: Rethinking the conceptual framework** | ▪ A theory or a framework representing a multidisciplinary phenomenon will always be dynamic and may be revised according to new insights, comments, literature, and so on<br>▪ The theory should make sense for those disciplines and enlarge their theoretical perspective on the specific phenomenon in question. | ▪ While beyond the scope of this study, it is expected that, even if the conceptual framework finds wider acceptance and application, it will continue to be adapted and updated over time and as used in varying contexts (see Chapter 5). |

Adapted from "Building a conceptual framework: Philosophy, definitions, and procedure," by Y. Jabareen, *International Journal of Qualitative Methods, 8*(4), pp. 53–55.

Using the methods outlined above, data from two sources, literature and interviews, were collected and analyzed.

**Literature data collection**. The main difference between the originally proposed methodology and that employed during the study was in the scope and analysis of literature data sources. In this area, the researcher's lack of experience caused him to greatly underestimate the time required to read, formally code, and analyze the thousands of pages of books and government reports originally proposed. To deal with the need to contain the scope of the study to reasonable time limits, he decided to complete formal coding and analysis only for the Comprehensive Institutional Plans (CIPs) that each of the CCIs are required to submit to the Alberta Ministry of Advanced Education each year—a process that still entailed reading and coding approximately 500 pages of text.

Although it was not practical to formally code the many other works as originally proposed, the researcher still wanted to ensure that the original intent of inclusion of these documents was fulfilled as inspired by Glaser's statement, "all is data" (2007, p. 1). Consequently, drawing upon another grounded theory principle of conducting a study's literature review as part of the research process, the researcher instead drew upon relevant portions of the intended government documents to inform the Alberta college history and current provincial system status presented in Chapter 1, while many of the other related studies and works on distributed education, the future of higher education, theories of planning, and management of post-secondary institutions that were reviewed by the researcher in completing his proposal were used extensively to complete the literature review found in Chapter 2 and to introduce and provide context for the study findings reported in Chapter 4.

**Interview data collection.** The interviews were semi-structured (Kallio, Pietilä, Johnson, & Kangasniemi, 2016), meaning that participants were provided a list of potential questions in advance, which offered "a focused structure for the discussion" (p. 2955) but which were not followed strictly, allowing the researcher and participants to freely explore related topics as well. The specific questions were developed based on findings during the literature review stage of the study and distributed to respondents in advance of the interview to allow them time for reflection and preparation (see Appendix A).

Each interview was planned to be of sufficient length (60–90 minutes) to allow meaningful exploration of issues with each respondent. These interviews were intended to uncover each participant's insights into the similarities and differences between the CCIs, the issues and concerns relevant to planning for delivery of distributed programming within Alberta's CCIs, and ideas on the most effective approaches to such planning processes.

Each interview was recorded and transcribed then coded and analyzed by the researcher (with input and feedback from colleagues serving as an evaluation steering committee) to reveal common themes and understandings to inform theory development. While conducting and analyzing the interviews, the researcher was especially attentive to historical, political, technological, or other issues that might distort managerial perceptions or otherwise undermine planning and implementation efforts. Having nearly 20 years' experience in Alberta's advanced education sector, the past 10 years as a senior administrator within a CCI, means the researcher is well equipped to note and code such issues as they occurred (see Researcher Qualifications later in this chapter).

One of the challenges encountered during the data collection and coding process was the tendency for the scope of the project to slowly expand due to the exploratory nature of the

interviews combined with the complexity and interconnectedness of the topics. In some ways, this was beneficial to the study, as many of the concepts discovered had not been fully anticipated and would not have been found had a less exploratory methodology been employed. In order to manage the project scope, however, the researcher employed three main strategies:

- Early restriction of the study scope to only a subset of the Alberta post-secondary system. In earlier iterations of the research proposal, the potential for exploration across the entire Alberta system and comparison with other provincial jurisdictions was considered. While such a project would likely yield valuable insights and might still be completed, it was clear that such a broad undertaking would be difficult to complete for a single researcher.
- Attention to theoretical saturation during the data collection process. This meant that while it would always have been possible to review and code additional documents or conduct additional interviews, the researcher noted with each additional data source whether additional insights or concepts were generated. This helped the researcher to avoid going beyond the original intent of the study.
- Constant comparison of new data and codes to avoid extensive proliferation of code categories that might lead to overly broad further inquiry. By making effective use of the MAXQDA software even during initial coding, the researcher was able to keep track of emerging concepts and ensure subsequent data collection remained focused on the intended questions while still remaining aware of new concepts that might be explored.

**Interview respondents**. A purposeful sample of 12 interview subjects was chosen based on the following criteria: 1) senior roles (both past and present) within the Alberta PSI system,

2) familiarity with Alberta CCIs and especially with distributed education systems within these institutions, 3) direct experience with the specific context and issues relevant to the study, and 4) expected insight into the issues impacting development of government and/or institutional plans. Three of these interview respondents were added while the interview process was underway as the researcher identified gaps in collected data and worked to fill these through additional theoretical sampling. The total number of interviews conducted was consistent with the advice of Guest, Bunce, and Johnson (2006), who found that 6–12 interviews were usually required to obtain meaningful data from a purposive sample and that saturation of conceptual analysis (meaning that no new concepts are added, see above) often emerged after 12 such interviews.

The following descriptive statements are intended to provide a sense of the depth and breadth of the respondents' background without compromising individual anonymity. Since all of these individuals have held more than one role within the Alberta post-secondary education system, the number of roles listed below totals more than the 12 individual respondents.

- Two respondents are current deans at Alberta CCIs with extensive senior experience in administering distributed education programs in both career and foundational education programs.
- Two respondents have held senior roles in administration of teaching and learning support centres with Alberta CCIs with responsibility for development and support of distributed education initiatives and formal roles within eCA.
- One respondent worked for many years within the CCI system but now holds a senior faculty and administrative role related to distributed education within one of Alberta's Comprehensive Academic and Research Institutions.
- Six respondents are current or former vice-presidents academic at Alberta CCIs.

- Two respondents are former or current senior managers within the Alberta Ministry of Advanced Education.
- One respondent holds an executive role responsible for information technology and distributed education systems within an Alberta Baccalaureate and applied studies institution.
- Four respondents were involved in establishing the initial vision and operating plan for eCA and held various senior management or operations positions within that organization.
- Eight respondents served as members of formal management or operations committees within eCA.
- Together, the 12 respondents represent almost 350 years of post-secondary institution employment and over 200 years of collective experience specifically in the planning and delivery of distributed education programs within Alberta post-secondary institutions.

As noted, the interviews were expected to last from 60 to 90 minutes, but in 8 of the 12 cases, this time was considerably exceeded due to the strong engagement of the respondents and their desire to share as much detail as possible. This resulted in approximately 22 hours of recorded dialogue that was then transcribed into 324 standard pages of text, which the researcher coded using MAXQDA software to apply grounded theory analysis methods.

As part of the coding process for both the literature and interview data, the researcher also engaged in writing reflective memos to document and connect his own experience in planning for distributed learning within an Alberta CCI and within eCA. These reflective

memos were coded as appropriate as the researcher worked to define and discover concepts within the collected data.

**Researcher Qualifications**

Though this study follows a rigorous and accepted method of qualitative research, it unavoidably relies to some degree on the subjective interpretations of the researcher himself (Charmaz, 2006; Glaser, 2007). While this can legitimately be seen as a source of bias in the study findings, it might also be considered a benefit in that the researcher has long-term, intimate knowledge and experience with multiple aspects of distributed education within the Alberta post-secondary system, and especially with the CCIs (Kincheloe, 2001).

Rather than pretend complete objectivity, the researcher presents himself as both a member of the Alberta CCI community and a qualified interpreter of the study subject, able to offer both valid commentary on the data and transparent description and justification for the findings induced from the data. He holds a master's degree in distance education and has been continuously employed in the Alberta post-secondary system since 1999 in several staff, faculty, and senior management roles—all directly related to curriculum, educational technology, and distributed learning.

**Ethics Approval**

Before conducting interviews with informants, the researcher received approval from the Ethics Review Board of Athabasca University. The certificate of approval was originally issued May 14, 2015 and renewed April 05, 2016. The renewal certificate is attached as Appendix B.

**Summary**

This chapter provided an overview of the both methodological approach for the study and processes and steps followed in its execution. It described the researcher's philosophical

orientation toward research and introduced and justified grounded theory as the methodology employed. It further described a specific application of grounded theory and conceptual framework analysis provided by Jabareen (2009) and provided an overview of how this method was applied to this study. Next, it described the sources of data and inclusion criteria for interview respondents. Finally, it provided an acknowledgment of the researcher's experience and place within the Alberta CCI system to support his claim as a qualified interpreter of the collected data.

The next chapter uses the phases of Jabareen's conceptual framework analysis to structure a narrative presentation of each stage in the process of collecting and analyzing data to develop a conceptual framework for the planning of distributed education in Alberta's CCIs. It summarizes the findings of the study and presents the proposed conceptual framework.

# Chapter 4

## Discovering the Conceptual Framework

"Plans are worthless, but planning is everything."

- Dwight D. Eisenhower (1957)

This chapter presents the data collected as outlined in Chapter 3 along with a summary of a conceptual framework analysis following the method suggested by Jabareen (2009). It does so through a narrative description of precisely how the researcher followed each phase of Jabareen's method, detailing the outputs and discoveries of each phase in sequence and supporting these findings with evidence drawn directly from the data. The intention is to lead the reader through the researcher's process of discovery, culminating in the development of a conceptual framework for the planning of distributed education in Alberta's CCIs.

To render the presentation of this chapter manageable for both researcher and reader, each major concept discovered in the data is considered as a whole, with iterative discussion of the many interconnected sub-concepts as required. This is meant to provide the reader with a view of the complexity of the issues while avoiding the impression that any one of these concepts can be approached in isolation. Complete listings of concepts derived from data during the stages of analysis are provided as Appendix C: Initial Coding System, and Appendix D: Final Coding System (Including Two Sub-code Levels).

Although the eight phases of Jabareen's method are presented sequentially, the actual process of analysis and sense-making cycled repeatedly through Phases 1–6 and reminded the researcher strongly of this report's opening quote regarding a "tangled mass" of spaghetti. Indeed, the concepts and relationships uncovered during the analysis of document and interview data proved so complex and interconnected that the researcher was reminded of former

President Dwight Eisenhower's (1957) often-quoted thoughts on the continued importance of a planning process, even if it proves so complex and subject to change as to render any specific plan difficult to execute—an idea that will be explored further as part of the report conclusion in Chapter 5.

Finally, as discussed in Chapter 3, Phases 1–6 of the conceptual framework analysis are fully completed as part of this study, in order to arrive a substantive but tentative theoretical framework of elements involved in planning for distributed education within Alberta's CCIs, Phase 6 explored the analyzed data in greater detail and summarized the results of the study. Phases 7–8 are discussed briefly at the end of the chapter as logical next steps for study to validate and generalize these findings.

**Phase 1: Outputs: Mapping the selected data sources**

> The first task in completing a conceptual framework analysis:
>
> is to map the spectrum of multidisciplinary literature regarding the phenomenon in question. This process includes identifying text types and other sources of data, such as existing empirical data and practices. It must begin with an extensive review of the multidisciplinary texts, and it is also recommended to undertake initial interviews with practitioners, specialists, and scholars from various disciplines whose work focuses on the targeted phenomenon. (Jabareen, 2009, p. 53)

Much of this work took place during the development of the research proposal and preparation for candidacy defence. Originally, a very large group of documentary data sources were considered for use as part of this phase. However, as the study proceeded, it became clear that the researcher's inexperience had resulted in a far too large initial pool of proposed data sources to be systematically analyzed within the scope and time limits of the project. The Phase

2 process outlined in the following section helped to reduce this pool to a manageable data set better suited to the study's scope and objectives.

**Phase 2: Outputs: Extensive reading and categorizing of the selected data**

Phase 2 requires that the researcher "read the selected data and categorize it both by discipline and by a scale of importance and representative power within each discipline. This process maximizes the effectiveness of…inquiry and ensures effective representation of each discipline" (Jabareen, 2009, p. 54). This phase of the study proceeded largely as outlined in the methodology discussion contained in Chapter 3, except for the reduction in formal data sources discussed in the previous section. Careful attention to the categories of documents available as data sources—especially the degree to which they related to the Alberta CCI context—allowed the researcher to continue using most of the literature named in Chapter 3 as reference material to inform analysis, while systematically coding only the data most directly from the current Alberta CCI context. This included:

- Transcripts of the 12 interviews, comprising 324 standard pages of text representing approximately 20 hours of dialogue with the respondents. This data set was expected to contain the most candid and exhaustive information for analysis because it allows the researcher to select respondents with specific experience within the Alberta post-secondary system and allowed iterative exploration of developing ideas and hypothesis with each new interview.
- 2015–18 Comprehensive Institutional Plans for each of the 11 CCIs, the most current versions available at the commencement of the coding process. Together, these CIPs represent approximately 500 pages of text coded by the researcher. Despite this volume of coding, the researcher chose to analyze all the CIPs as a potentially valuable source of

comparison between the informant's testimony and the public statements made by the CCIs.

Many of the documents originally considered, especially government documents describing historical aspects of Alberta's post-secondary system, were instead used to provide the study context and background found in Chapters 1 and 2.

**Phase 3: Outputs: Identifying and naming concepts**

Jabareen states that the aim of Phase 3 is to "read and reread the selected data and 'discover' concepts. Its result is a list of numerous competing and sometimes contradictory concepts. Generally, this method allows concepts to emerge from the literature" (2009, p. 54).

This phase of the study proceeded largely as outlined in the methodology discussion contained in Chapter 3. To complete this critical phase of data analysis, the researcher relied heavily on the data coding practices outlined by Charmaz (2006) and Saldana (2013), using the extensive tool set available with MAXQDA analysis software to manage the considerable volume of text and codes generated by the process. During this phase, the analysis consisted of two coding cycles: initial and focused. Outputs from these phases are found in Appendices C and D respectively.

**Initial coding.** This coding method involves "breaking down qualitative data into discrete parts, closely examining them, and comparing them for similarities and differences" (Saldana, 2013, p. 100).

The main steps during this coding cycle were as follows:

- Read each of the 11 CIP documents line by line, assigning codes to salient ideas and writing memos along the way to describe the perceived importance and relationship between text, codes, and concepts. The purpose of this step was to develop a list of

concepts related to distributed education that the CCIs viewed as sufficiently important to address in a public planning document. These concepts were then used as part of the background preparation for the later interviews and eventually for comparison to the codes generated from interview data.

- Read each of the 12 interview transcripts line by line, assigning codes, and writing memos as described above. The codes developed while analyzing the CIPs were considered and sometimes used when the concepts within the interview data seemed a match, but extensive new codes were also developed during this step.

At the conclusion of this coding cycle, a total of 1,791 segments of text had been assigned 2,517 total codes comprising 322 unique codes with extensive overlap (multiple codes assigned to a segment of text) and some redundancy (different codes with similar meanings). See Appendix C.

**Focused coding.** This coding method "categorizes coded data based on thematic or conceptual similarity" (Saldana, 2013, p. 209) and is used to "synthesize and explain larger segments of data…using the most significant and/or frequent earlier codes to sift through large amounts of data" (Charmaz, 2006, p. 57). An important goal during focused coding is to determine which of the initial codes make the most analytic sense. The researcher followed Charmaz's (2006, p. 58) advice to "act upon your data rather than passively read them" allowing "unexpected ideas" to emerge during the process.

In completing this coding stage, the researcher drew heavily on his nearly 20 years of distributed education development, instruction, and administration experience within the Alberta post-secondary system to both split and combine the previously developed code set into a more

refined set of approximately 120 codes. The visual mapping tools in MAXQDA proved invaluable in tracking and revising the multiple combinations leading up to this result.

At the completion of this coding phase, the researcher was confident that a sufficient level of saturation had been reached, meaning that in his judgment no new concepts were emerging from the data nor likely to emerge from additional data. He based this conclusion partially on the previously mentioned findings of Guest et al.(2006) that saturation often occurs after 12 interviews from a purposive sample but also on the fact that, of the approximately 120 codes in place at this stage, only 8 were based on data collected from only a single respondent; all others had multiple occurrences across interviews.

**Phase 4: Outputs: Deconstructing and categorizing the concepts**

> In Phase 4, the goal is to:
>
> deconstruct each concept; to identify its main attributes, characteristics, assumptions, and role; and, subsequently, to organize and categorize the concepts according to their features and ontological, epistemological, and methodological role. The result of this phase is a table that includes four columns. The first includes the names of the concepts; the second includes a description of each concept; the third categorizes each concept according to its ontological, epistemological, or methodological role; and the fourth presents the references for each concept. (Jabareen, 2009, p. 54)

This phase proved to be one of the most challenging in the study for two reasons. First, due to the large number of initial codes generated during Phase 3—many nuanced and overlapping, as noted—completing this process as outlined by Jabareen would have been excessively time-consuming and would not likely have yielded substantial insights. Second, classifying concepts as ontological, epistemological, or methodological was no trivial task, as

Jabareen offers little by way of explicit instruction for how such determination should be made, affecting the reliability of the researcher's interpretation.

To deal with the volume of concept codes involved, the researcher decided to wait until after the concept integration was completed during Phase 5 (as described in the next section of this chapter) to reduce the concepts to a manageable number of categories more in keeping with Jabareen's example.

Coming to an understanding of how best to classify the concepts by their ontological, epistemological, or methodological role was a more difficult challenge. The researcher first attempted to contact Jabareen directly by email to gain further insight into his methodology but received no response. Not wishing to abandon this stage of the analysis and any potential insights that might arise from it, the researcher instead focused on developing his own interpretation of the method adapted for the needs of this study. After a review of literature on the topic (Broadbent, 2016; Gay & Weaver, 2011; Gioia & Pitre, 1990; Guba & Lincoln, 1994, 2009), the following simplified working definitions were adopted as in keeping with standard definitions and adequate to the task:

- *Ontology*: Beliefs regarding the nature of reality, including if and how an entity (such as a concept) exists as a valid subject of inquiry and how such entities relate to one another.
- *Epistemology*: Beliefs regarding what constitutes knowledge or how it is possible to accept knowledge as valid.
- *Methodology*: Beliefs regarding what techniques or processes might be used to acquire knowledge within ontological and epistemological constraints of the researcher's world view.

Given the constructivist and critical realist leanings of the researcher along with the grounded theory methodology employed, as discussed in Chapter 3, it was not surprising to find that the final concepts discovered from the data largely represent the creation of an ontology of the elements which should be considered in relation to one another when planning for distributed education within the Alberta CCI context. In other words, the role these concepts play in the final conceptual framework is ontological: to make concrete and explicit the elements considered to exist within the system.

Based on this realization, the researcher has chosen to forgo an attempt to further categorize the concepts and instead present a summary of the concepts, their description, and their value to understanding the greater system in a single table. For concision, this is presented in the next section detailing Phase 5 of the analysis process, as in practice these phases proceeded in a tightly intertwined and iterative fashion.

**Phase 5: Integrating concepts**

Phase 5 of the concept analysis framework process "is to integrate and group together concepts that have similarities to one new concept. This phase reduces the number of concepts drastically and allows us to manipulate to a reasonable number of concepts" (Jabareen, 2009, p. 54). To complete this phase of the analysis, the researcher engaged in a further round of code consolidation, applying the principles of theoretical coding as described by Charmaz (2006):

> Theoretical coding is a sophisticated level of coding that follows the codes you have selected during focused coding…theoretical codes specify possible relationships between categories you have developed in your focused coding….Theoretical codes are integrative; they lend form to the focused codes you have collected. These codes may help you tell an analytic story that has coherence. Hence, these codes not only

> conceptualize how your substantive codes are related, but also move your analytic story in a theoretical direction. (p. 65)

During this phase, the researcher drew upon his experience in the field and the perspectives of the literature outlined in Chapter 3. He constantly asked himself three questions as he compared the 120 coded concepts to each other:

1. Does this concept contribute to building a shared understanding of factors likely to be involved in planning for distributed education within the Alberta CCIs as discovered from the data? If so, how?
2. Does this concept overlap or have a specific relationship with any of the other concepts? If so, is it a subset of that concept? Would any meaningful nuance or understanding be lost if the concept were consolidated with another similar concept?
3. Will the expression of this concept be sufficiently clear and meaningful to those charged with program and systems planning within Alberta CCIs? Could the concept be rendered more clearly?

Using the visual concept mapping tools within MAXQDA which allowed coded concepts to be easily manipulated to consider different relationships and hierarchies (see example in Figure 2), the researcher worked through an iterative process of refining and recombining the 120 concepts. After completing this process, he arrived at a set of 11 integrated concepts that expressed the essence and range of the data while being sufficiently concise as to allow meaningful discussion and to be used as the basis for a conceptual framework. However, due to the great range of concepts initially discovered within the data, the researcher was also careful to prevent loss of more nuanced or descriptive ideas and thus preserved two levels of

sub-concepts to better illuminate the meaning of the integrated concepts and make transparent the sub-concepts that contributed to them.

*Figure 2.* Example of MAXQDA visual concept mapping tool used to organize concepts.

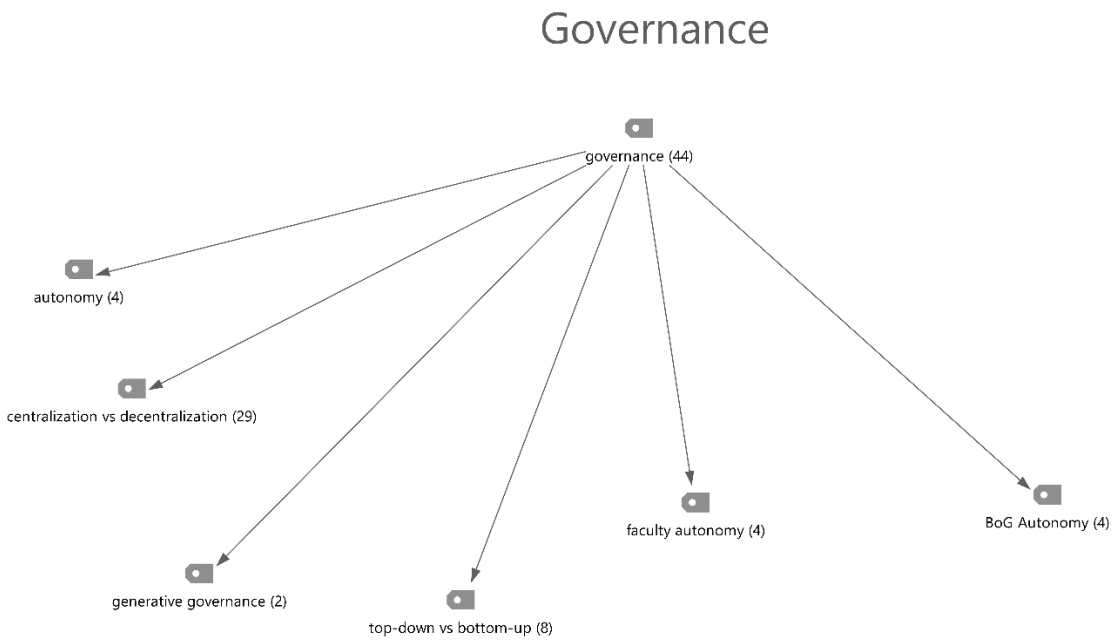


Table 5 details the integrated concepts discovered from the data, their descriptions, and perceived value to development of the final conceptual framework. The complete taxonomy of the integrated concepts along with the two levels of sub-concepts is found in Appendix D. Relevant sections of this complete taxonomy are also presented along with insights and examples from the data as part of the next section, Phase 6: Outputs: Synthesis, resynthesis, and making it all make sense.

Table 5

*Integrated Concepts*

| **Integrated Concept** | **Description** | **Framework Value** |
|---|---|---|
| 1. **Provincial System** | - Refers to issues related to the overall functioning of the entire Alberta post-secondary system, especially how all the various actors (both institutional and individual) are related to each other and interact with each other. This concept explicitly includes actors outside the CCI sector<br>- Includes issues such as Campus Alberta, eCA, institutional mandates, role of government, etc.<br>- | Sets the context within which CCIs operate and which they must play a coherent role |
| 2. **Planning** | - Refers to all issues related to efforts to anticipate and design the achievement of goals or outcomes for distributed education within Alberta's CCIs<br>- Includes issues such as planning methods, complexity of the process, barriers to the process, etc. | Addresses the central questions of the study and conceptual framework by explicating current and potential planning practices |
| 3. **Leadership** | - Refers to all issues related to how leadership (both institutional and individual) impacts distributed education within Alberta's CCIs.<br>- Includes issues such as executive champions, vision, leadership, change/turnover, etc. | Draws attention to the importance and potential pitfalls of leadership at the CCI and provincial system levels in advancing successful planning for distributed education |
| 4. **Technology** | - Refers to all issues related to information technology and its relationship to distributed education in Alberta's CCIs<br>- Includes issues such as computing infrastructure, cloud computing, communications systems, software, etc. | Draws attention to the cross-cutting and rapidly expanding role of information technologies in enabling delivery of distributed education and the absolute need to consider this concept in any related planning |

| | | |
|---|---|---|
| 5. **Rationale for DE** | - Refers to the reasons actors within Alberta's post-secondary system might consider as justification for pursuit of distributed education options<br>- Includes issues such as campus space, competition, student demand, etc. | Encourages explicit statement of the reasons for pursuing distributed education options and desired outcomes |
| 6. **Internal Environment Issues** | - Refers to aspects of the internal environment at individual Alberta CCIs that impact planning for distributed education<br>- Includes issues such as culture, existing polices, organizational structure, etc. | Draws attention to the many issues within a CCI that may act as facilitators and barriers to the planning and implementation of distributed education |
| 7. **External Environment Issues** | - Refers to aspects of the external environment that impact planning for distributed education at Alberta CCIs. This concept is considered separately from the "provincial system" but is tightly related.<br>- Includes issues such as geography and catchment area, economic and demographic trends, etc. | Draws attention to the many issues external to a CCI that may act as facilitators and barriers to planning and implementation of distributed education |
| 8. **Governance** | - Refers to issues related to the governance and management of post-secondary institutions as it impacts delivery of distributed education, especially within Alberta CCIs.<br>- Includes issues such as autonomy, centralization vs. decentralization, decision-making processes, etc. | Draws attention to the important role that decision-making and control mechanisms can make in facilitation or obstruction of planning and implementation of distributed education. |
| 9. **Academic and Delivery Considerations** | - Refers to issues related to teaching and learning issues for distributed education within Alberta's CCIs<br>- Includes issues such as staff and faculty roles, instructional models, support services, etc. | Draws attention to the complex and diverse issues of educational practice that must be considered for successful planning of distributed education |

| | | |
|---|---|---|
| 10. **Costs and F**unding | - Refers to issues related to financial considerations for distributed<br>- education, both within Alberta CCIs but also across the Alberta post-secondary system<br>- Includes issues such as government funding, efficiency of operations, sustainability of programs, scalability of programs, etc. | Draws attention to the fact that all plans require sufficient resources and sustainable business models in order to be viable |
| 11. **Innovation** | - Refers to issues related to changes in practice intended to produce superior results in the delivery of distributed education within Alberta CCIs<br>- Often involves information technology but is distinct from that concept in that it can refer to any change in practice<br>- Includes issues such as rethinking pedagogy, distinguishing between change and innovation, unintended consequences of change, etc. | Recognizes the reality that post-secondary education systems are under pressure from stakeholders to find new models of practice that are effective, efficient, and scalable |

**Phase 6: Outputs: Synthesis, resynthesis, and making it all make sense**

According to Jabareen (2009), the aim in this phase is to "synthesize concepts into a theoretical framework. The researcher must be open, tolerant, and flexible with the theorization process and the emerging new theory. This process is iterative and includes repetitive synthesis and resynthesis until the researcher recognizes a general theoretical framework that makes sense" (p. 54).

This phase of the analysis in some ways amounts to an explanation and formalization of the integrated concepts developed during Phase 5, along with a description of the overall conceptual framework that results. To accomplish this, the researcher presents in this section of the document an overview of each of the 11 integrated concepts and those associated sub-

concepts which were not subsumed within the integrated concepts as part of the synthesis process, along with discussion of their context and significance, with extensive "evidentiary support" (Saldana, 2013, p. 201) from the data. This is intended to present the researcher's interpretation of the data while at the same time increasing trustworthiness of the findings by ensuring that these are "buttressed by convincing quotations" (Weiss, 2004, p. 50) and provide the reader with a sense of the respondents' thoughts in their own words.

While the sub-concepts not subsumed within the 11 integrated concepts are presented for completeness and sometimes referred to as helpful "guide posts" in exploring the integrated concepts, these are not necessarily examined fully or individually but rather to the degree necessary to adequately explain the integrated concepts to which they relate. Discussion of each integrated concept concludes with a set of questions based on the findings that may be helpful to those planning for distributed education within Alberta CCIs.

While the discussion presented as part of Phase 6 is sufficient to establish the character and validity of the integrated concepts that make up the final conceptual framework, it is by no means a complete explication of all the nuanced sub-concepts discovered during the study, as this would be well beyond the scope of this project. The sub-concepts—especially those designated as second level—are not fully developed but have been preserved and presented here to ensure that the components of the integrated concepts are considered as part of the analysis and to provide insight into the complexity and interconnectedness of the integrated concepts. The potential for more complete development of these sub-concepts as part of future research in this area is discussed in Chapter 5.

The integrated concepts are presented here in order of decreasing frequency of occurrence of related codes assigned during the initial coding cycle. In other words, those

concepts which were most prevalent in the data appear first. However, this order does not necessarily indicate greater importance or value as part of the final conceptual framework. Rather, the frequency of the concepts' appearance in the data (especially the interview data) was due to factors such as the nature of the interview prompts, the background of the researcher and respondents, current events and issues within the CCIs and the province, among many others. Knowing this, the researcher sought a wide and diverse set of sufficiently informed respondents to help mitigate issues of sampling bias and discussed potential interview choices with colleagues serving as a steering committee to identify and access appropriate initial and supplemental respondents.

This section concludes with a graphical representation of the final conceptual framework based on the example from Jabareen (2009, p. 58) but including somewhat more explanatory detail regarding the relationship of the integrated concepts.

**Provincial System.** This integrated concept refers to issues related to the overall functioning of the entire Alberta post-secondary system, especially how all the various actors (both institutional and individual) are related to each other and interact with each other.

Table 6

*Provincial System Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Provincial System** | • Campus Alberta | • Athabasca University<br>• eCampusAlberta<br>• interpersonal relationships and networking<br>• collaboration vs. competition |
| | • differential benefits of system collaboration | • institutional autonomy<br>• institutional consolidation<br>• pathways<br>• rationalization<br>• self-interest<br>• shared understanding |

| | | |
|---|---|---|
| | • mandate | • CCIs as access point vs. institutions<br>• institutional diversity<br>• regional stewardship<br>• socio-cultural role |
| | • politics | • history of universities and colleges |
| | • role of government | • market vs. regulated post-secondary environment |

One of the issues frequently mentioned in the colleges' CIPs and by the interview respondents is the idea of "Campus Alberta," discussed in Chapter 1. Although still mostly a concept rather than an actual organization or process, it is intended as an approach to organization and operations that will "encourage…collaboration and cooperation between the province's 26 publicly-funded post-secondary institutions" (Government of Alberta, 2007) and has been part of the provincial agenda since 2002 (Government of Alberta, 2007).

Despite its status as an organizing principle, Campus Alberta was generally viewed by respondents as being of mixed value, a lack of role clarity being a common criticism:

> And Campus Alberta over all. We've been talking about it for years since [a former government minister's] day and it has never been well defined, but it has been an accepted emerging concept of some kind. Everybody sort of gets it even if they can't define it. But as soon as they pushed putting the universities in, it was hugely backward. (Respondent 08)

Other respondents, especially those with wider provincial system responsibilities and perspectives, affirmed the ongoing emphasis on a provincial approach to post-secondary planning:

> But you know, Campus Alberta is the big thing. We even have a CASDC (Campus Alberta Strategic Directions Committee)….And so when you look at Campus Alberta

> and if you actually put it in and say we're going to act as the post-secondary environment for Alberta and how are we going to provide education that is going to meet the challenges of Alberta, you have to work like a system. Because the competition isn't going to be internal. It's going to be everywhere else. (Respondent 07)

A frequently mentioned aspect of Campus Alberta was the recent provincial emphasis on regional stewardship (see Chapter 1) and the role of CCIs in providing access to post-secondary learning with their assigned geographical region. One respondent viewed regional stewardship as perhaps the only concrete manifestation of Campus Alberta:

> It's that the system isn't keeping up with being a cohesive system and so institutions are having to survive and Campus Alberta as a concept has been around since 2002. You're hard pressed to find anything makes anyone feel like Campus Alberta other than perhaps regional stewardship. (Respondent 11)

Another respondent—concerned with issues of redundancy and sustainability—expressed the view that CCIs might best be considered access points to the wider provincial system rather than fully independent institutions:

> We still think of them as institutions and if we're going to sustain them, they have to be access points. When we start to look at the patterns that students are willing to go for degrees or different types of parchments; specialized parchments, they will go wherever; engineering, you're going to go to a certain area.
>
> and
>
> I think CCIs, especially. Fundamentally they have to move to a very systems-based approach. Because you can't duplicate that, replicate that in every one of the CCIs. Eleven times over. You can't. We can't even sustain the systems we have. And you

> will have to see collaboration and cooperation and it fundamentally has to become about the access and the education as opposed to the institution. It is fundamentally what needs to change. (Respondent 07)

This sentiment was echoed by a respondent working within one of the CCIs, citing challenges related to inefficiencies inherent in Alberta population distribution:

> I think the way that Alberta's population is distributed we're always going to have huge inefficiencies because all of these comprehensive institutions really are too small to be comprehensive, and it doesn't make sense for them to be comprehensive. There's not enough people to serve. (Respondent 01)

Despite the general support for the benefits of system-wide collaboration, respondents were also quick to point out the tension between competition and collaboration within the Alberta post-secondary system, including the differential benefits to different types and sizes of institutions and the reality of institutional autonomy, individual self-interest, and self-preservation as factors in decision-making at individual CCIs:

The following are typical examples of respondent comments on this topic:

> …you're just out competing in this big space for a set resource. There are only so many students available. The pie doesn't get bigger. So there is that issue. The other is in the absence of a more, I don't know what to call it, a more regimented system, and I've been on some of the PLAR committees in the province and things like that. The challenges of getting transfer and articulation to work across institutions because they have a history of autonomy is huge, and this is where to me a central issue comes up. And that is that functioning is a part of the system, a really good team-oriented player in the system is

> not always in the best interest, and in fact is frequently not in the best interests of the local leadership of an institution. (Respondent 07)

> And you know, I understand where they're coming from because they are small, they are broke, and enrolment is number one, is everything. And it's like when you're hungry, you'll do anything. So, I understand where they're coming from. Where I'm disappointed is from a couple of institutions that are not in that position and don't have to be and aren't seeing the opportunity to build a really strong, large, consortium. (Respondent 12)

All respondents spoke at some length regarding the impact of eCA on the province's post-secondary landscape. This would likely have been true under any circumstances given its prominent role over nearly 15 years, but the topic was particularly salient given that the consortium was widely known to be nearing its end during the period the interviews took place (as noted above. eCA did finally cease operations on March 31, 2017).

Given the timing of these events and the researcher's own long involvement with eCA, it was fascinating to listen to the divergent views on the value of eCA, its unresolved conflicts, and the reasons that respondents believed it was likely to collapse. At some point, a full examination of eCA should be undertaken to fully examine the forces that both propelled and restrained it. However, for the purposes of this study just two ideas will be noted.

First, respondents almost universally viewed eCA as a positive and constructive force in advancing distributed education in Alberta, most especially amongst the CCIs. It was seen as a concrete, organized manifestation of the Campus Alberta model promoted by the provincial

government that improved the quality and sophistication of many institutions while promoting genuine collaboration across the provincial system:

> CCIs were not talking about quality standards until eCampus came along and brought in quality standards for online delivery. Now, some of those institutions have virtually adopted eCampus' quality standards for all delivery, irrespective of modality. (Respondent 02)

> So I think the greatest thing eCampusAlberta did was they forced institutions to work together. I don't believe it ever would have happened had we not been told…we had to work with another institution. (Respondent 05)

Second, respondents tended to view many of the barriers to eCA's success as directly related to the three issues below.

1. Inability to put aside competition and self-interest:

   > ….elbows are sharper than they used to be, and I think that is affecting the entire system where institutions are now retreating from system perspective to me perspective. And the government, I think, is responsible in large part for not incentivizing collaboration. They say it matters and they ask you to report on it on your CIPs, but the large institutions still win out and that begins to burn some of the other institutions, I think. (Respondent 11)

2. Near-forced inclusion of the four CARIs (research universities) in the consortium:

   > I suspect we'll go down in record as saying that [adding the CARIs] was a pivot point that could potentially be what is leading, well could be leading to, the demise of eCampusAlberta. (Respondent 11)

3. Inadequate leadership and support from the provincial ministry:

> ….in the end is that some institutions simply said we're not going to do it anymore. Because not only is it not making economic sense because we don't see the benefit anymore, but all the principles that we started with are lost…. And then, of course, the fact that the government is not interested anymore. There was a time and you'll remember this when substantial flow-through funding came from the ministry. (Respondent 10)

A somewhat unexpected issue emerged as important to many of the respondents: the role of Athabasca University (AU) in the provision of distributed education within the Alberta system and the most appropriate relationship between AU and the CCIs. For these respondents, AU's role had become less clear as so many of the PSIs had begun aggressively pursuing distributed education as part of their core strategies. In general, AU was seen as a barrier to the success of eCA rather than a collaborative partner:

> Athabasca was the elephant in the room for 10 years. They joined the consortium….They did [nothing] and the whole basis for why they didn't do anything was because they didn't want to pay the fee. They couldn't economically pay the fee. It was ridiculous. (Respondent 10)

Based on other respondent comments and his own experience, the researcher speculates that the difficulty in adding AU to eCA may have been partially due to perceived overlap of mandates in providing accessible distributed education to the Alberta post-secondary system. Thus, eCA may well have looked more like a threat than an opportunity to AU's internal stakeholders.

It is also important to recognize the history of the Alberta PSIs as autonomous institutions (see Chapter 1), which contributes to the ethos of the provincial post-secondary system. Despite the organization of the six-sector model and general provincial encouragement to collaborate, all of the Alberta PSIs are unique and independent organizations:

> The challenge in a society where history is present….in other words autonomous organizations like [Mount Royal University] have been autonomous for a hundred years. Telling them that they now have to lose that and be part of the happy collective is not likely going to be what they are real keen about. Or even [Bow Valley College] with 50 years [of history and tradition] is that people's identity and the autonomous nature of that identity is highly significant. (Respondent 09)

> The challenges of getting transfer and articulation to work across institutions because they have a history of autonomy is huge, and this is where to me a central issue comes up. And that is that functioning as a part of the system, a really good team-oriented player in the system is not always in the best interest—and in fact is frequently not in the best interests—of the local leadership of an institution. (Respondent 07)

> The other difference is a historical difference. Some of the regional CCIs like Medicine Hat and Grande Prairie and Red Deer and so on were formed in the [1960s] in the very much the junior college kind of history. The transfer program and the diploma programs were their core offerings at that time. Five CCIs have their roots as Alberta Vocational Centers; two have their roots as agricultural colleges going way back in time…..So there

> are very real historical differences, and those historical differences become cultural differences for the institutions. (Respondent 02)

Finally, the political traditions and norms of the provincial post-secondary system must be considered, especially as Alberta is recently experiencing its first new government in 40 years. According to many of the respondents, provincial direction to this point has been a sometimes confusing mixture of "hands-on" and "hands-off" management with conflicting incentives for competition and collaboration:

> And the larger institutions started to say that eCampusAlberta was something that was imposed on them by the former government. So, it allowed separatist behavior to happen again. There were presidents quoted as saying, "Oh, well, we don't need to collaborate anymore" because they thought that was the mandate of the former government. What's unfortunate about that is that's about institution survival…rather than servicing all Albertans. And so, the ethos of Campus Alberta has never taken hold. (Respondent 11)

> I think under [the previous] government they [had] a mindset of less government and more individual choice and then when institutions had choice, they chased where the money was. Either eCampusAlberta money or opportunistic money because of high demand. So, there was no regulation ever put in place for online. That decision needed to be made 15 years ago before eCampusAlberta even. (Respondent 03)

***Suggested planning questions***. Based on the findings related to the provincial system integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What is the role and mandate of the institution within the larger provincial system? Will distributed education initiatives enhance or detract from this role and mandate from a provincial perspective?
2. How will the institution collaborate with other Alberta PSIs in the delivery of distributed education to maximize system efficiency? Will distributed education efforts result in unnecessary redundancy of program offerings across the province? How, if at all, does the role and mandate of Athabasca University impact such plans?
3. What are the unique historical, cultural, community, or other aspects of the institution, and how will these be enhanced or otherwise affected by distributed education initiatives? How will issues impact planning, and especially how might they positively or negatively impact collaboration with other institutions?

**Planning**. This integrated concept refers to all issues related to efforts to anticipate and design the achievement of goals or outcomes for distributed education within Alberta's CCIs.

Table 7

*Planning Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concept | Level 2 Sub-concept |
|---|---|---|
| **Planning** | • complexity | |
| | • coordinated planning | |
| | • distance learning as a driver of organizational growth and change | |
| | • elements of effective planning | |
| | • planning benefits | |

| | | |
|---|---|---|
| | • planning methods | • lack of planning as a strategic decision<br>• top down vs. bottom up |
| | • planning timelines | |

The idea for this study was born from the researcher's anecdotal observation that planning for distributed education across Alberta's CCIs has tended to be somewhat ad hoc, or at least not approached in a consistent fashion across the provincial system. Still, the researcher was somewhat surprised by the lack of specific planning processes apparent in the data gathered from interview respondents—and thus reassured of the potential value of this study to aid the CCI sector in developing more thoughtful, coordinated approaches to planning for distributed education.

When discussing existing planning processes for distributed education, responses such as the following were common:

> So even in their planning processes [for distributed education programs], we don't have an evidence-gathering theme institutionally that says we think these programs should be online and these ones shouldn't. Right now, it's up to the individual programs to go that direction. So, it would be up to the program chair and the program dean to bring it forward. So, we have a process in place that approves the development of online courses each year. [We] gather, all that information from the deans and chairs—all the requests coming forward and that goes to our academic leadership team for approval…I would say it is a rubber stamp, for sure. (Respondent 04)

One of the most common themes that respondents expressed during interviews was environmental complexity—often quickly accompanied by thoughts on how such complexity tends to drive less formal, shorter planning cycles:

> I guess I'm trying to get at the idea of how do you plan for change that happens so rapidly? That you can't even assume that five years from now what plan will be sufficient. And what's the role of planning in an environment that is so dynamic….So, I think maybe, long-term planning has to be, kind of value-driven, but it's really the meat [of the planning process]. I think maybe we just have to have shorter windows of fixed activity and an awareness that that's the case. And you know when you think about building buildings and how much power you need, what a workstation looks like or what a classroom looks like, that's all a part of planning. And so maybe rather than thinking about planning in 20 or 30 years, know that you at best can see the next 10 years. And just have that acute sense of awareness that everything that you're putting in place has got to have the flexibility to accommodate something you can't even see or imagine. (Respondent 01)

> You'll never see [college name] do a 10- or 20-year plan. It's a three-year CIP [comprehensive institutional plan] that's ever-greened every year and it's a rigorous review every year. If you are looking for a distributed learning plan, it would fall under Campus Alberta Central which does regional needs assessments and community input and then they do all the delivery within our region, but we don't have a plan to say [our college] over the next five years is going to do distributed learning in these three areas. (Respondent 03)

The same respondents offered the perspective that, for innovative PSI activities like distributed education, planning should be balanced with the need for action through continual trial of new ideas to inform a dynamic cycle of planning, practice, and reflection:

> I think you cannot really begin to plan until you are well on the road to somewhere, and that's maybe more an organizational behaviour thought in my mind. But I don't think that you can have a bunch of people who sit around and one day they get together on a meeting and they say we are going to do distributed learning. What do we need? And then, IT says we need bandwidth, we need support, we need technical things, and we need standardized curriculum. To me, I have never seen an institution that comes out from a plan. What I see is an institution that fosters a certain kind of approach and people innovate and then that innovation becomes an activity. And then suddenly there is so much activity here that we need to actually bring it under an umbrella. And then you say let's plan. But if you don't do the innovation, there's nothing to plan for. It just never arises. (Respondent 01)

> If you take a bold move, it will open doors for other things. If we took an incremental step, everything would have been an incremental slow step. So, we moved to Google for Education which has been transformative for cloud-based collaboration. (Respondent 03)

Despite this emphasis on rapid action and innovation, there was also recognition that at some point such activity must become part of regular operations if it is to continue and scale sustainably:

> People start with some kind of idea in somebody's garage. They don't have a policy; they're not all doing the same thing. There is this kind of creative, free, unstructured, unplanned activity. And then you get to some level where you think now we have to harness this energy, but we have to standardize it, too, for purposes of efficiency….I

> think that the process that we undertook of talking to everybody to be sure that we're on the same page, recognizing our differences, and then coming up with a system that began to standardize our processes and even acknowledge the existence of the need of processes and then putting them together collaboratively, I think has also been really effective. (Respondent 01)

One respondent had been involved in formal projects planning for distributed education within four CCIs and offered insights and potential best practices. One such practice was early inclusion of the institution's executive team in the process:

> Number one, when we were developing the strategy for [college name], one thing we did very early on was interview members of the executive team individually. And I think was key in terms of reminding them that this is going on, engaging their attention, and also finding out what the parameters were. So, you want to colour within the lines and we had to find out where the lines were. So, and I think I kind of pushed that as a part of the process and pushed it as being very early because I didn't want to be, as an outsider, getting led down the path by people inside the institution that I knew would clash with what members of the executive were thinking about. (Respondent 02)

Another best practice suggested by the same respondent was to solicit broad input from students through a survey or other similar method to ensure that the plans are aligned with this stakeholder group and not unintentionally driven exclusively by organizational or political issues:

> Another key [or] effective part of what we did [in developing a distributed education plan] was the learner questionnaire. It provided a voice for learners and it reminded people who were involved in the process that this is all about learners. I mean, it sounds

> a bit trite to say that, but leaders among any organization can dialogue among themselves and forget their ultimate goal is success for learners. And I think the fact that we had that questionnaire data, and we sat with it, and we went through it and we tried to see the patterns, and we tried to identify—and we did identify—action areas that became part of the strategic direction came out of that learner questionnaire. I looked it up and I won't take the time, but I think, yes, from the learner questionnaire and then a related activity was that business processes study that preceded the strategy developments project. So then, that was again capturing a snapshot of what is in the organization. (Respondent 02)

Yet another suggestion from the same respondent was to engage in meaningful dialogue with front-line faculty and staff who will be most affected by any new processes rather than limiting input to more senior program leaders—such as deans, chairs, and coordinators:

> But there is one thing that I would say that everybody should do, and we didn't do, and that was more dialogue with faculty and staff who are front line in distributed learning….So, instructors, counselors, financial aid, instructional designers— that group. I think that can be done simply by small focus groups. Create the opportunity for people, open it up to people, people participate if they wish. What they say goes into a "what we heard" document so we have the learner questionnaire as one "what we heard" document, the executive team is another and the faculty and staff is another one. Anyway, I think they need to be heard. It builds their commitment, and it keeps the thing really grounded. (Respondent 02)

Finally, Respondent 2 noted that planning of this nature across an institution is a significant task that will likely benefit from dedicated resources:

> Well the value of an outsider—I've been doing this kind of for six years—is that it's first and foremost obtaining the services of a person who has dedicated time and energy. So, you can replicate that inside [the institution] by taking someone who has the right background and saying we're relieving you of your core duties for the next six months, and take on this initiative. So, it can be done inside as long as the person obviously has the background, but more importantly is given an unencumbered block of time to work on it. You know, so often people at the end of…projects say, "Oh, thank God we were able to bring somebody in because if we had to do it off the side of our desk, it would never have got done," or "We would have had less time and we weren't able to do the research that you were able to do."…It's more of a process thing than a content expertise thing. So, if the person has the process background, has got some relevant experience base, has got the dedicated time, it can be done inside. (Respondent 02)

***Suggested planning questions***. Based on the findings related to the Planning integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What planning processes (especially academic) already exist at the institution? How do they (or might they) impact or intersect with any initiative to plan for distributed education?
2. What is the appropriate planning cycle for distributed education at the institution? How will this planning cycle be reconciled with rapid change and the need to respond to emerging opportunities?
3. What individual distributed education initiatives already exist at the institution? How will these be brought within the institutional plan for distributed education?

4. What are the significant stakeholder groups that should be consulted as part of the planning process? How will they be engaged?
5. What resources (time, effort, funding) will be required to complete the planning process? Who will be charged with leading the process?

**Leadership**. This integrated concept refers to all issues related to how leadership (both institutional and individual) impact distributed education within Alberta's CCIs. It includes issues such as executive champions, vision, leadership change/turnover, etc.

Table 8

*Leadership Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Leadership** | • change in leadership | |
| | • executive team | • executive champion<br>• executive commitment |
| | • leadership deficits | |
| | • leadership style | |
| | • other champions | • outsized influence |
| | • vision | |

The interview data contain several references to the importance of leadership in planning and realizing distributed education initiatives. Most respondents seemed to equate distributed education practice with change from the status quo and recognized that this required effective leadership to succeed. However, some respondents were focused on leadership at the institutional—or even departmental—level, while others drew attention to leadership at the system level, and especially within the provincial ministry.

In commenting on the need for effective leadership at the institutional level, one respondent noted the importance of a clearly articulated expression of vision for distributed education:

> I would say the most important thing is actually some kind of concrete institutional expression of interest and commitment to distributed learning….Making that so clear and obvious to everybody that it becomes a part of your DNA. So that's number one. Without that you don't have an initiative. You don't have a commitment, a direction, a passion, a way of being. (Respondent 01)

Several of the respondents commented on the need for senior institutional champions for distributed education—combined with a willingness to formalize and document the institution's commitment. The vice-president academic was commonly mentioned as the leader most essential to success by aligning with and moving forward the president's vision:

> …we're really talking about organizational change, and this is where the executive champion has to come in. And it would seem to me it's got to be the VP academic because we're talking about an academic enterprise, but certainly the president has got to be equally committed although not necessarily engaged like the VP academic….
>
> [D]istributed learning has to be identified as part of the strategic direction for the institution….But it has to be formalized, it has to be in documents, it has to be in presidential addresses, it has to be in board conversations. That kind of thing. (Respondent 02)

One respondent expressed that some of the difference between Alberta institutions' progress in advancing distributed education was due to the personal leadership characteristics of those in senior leadership positions:

> …in institutions, you have some leaders [who]are stronger than other leaders. The provost of University A may be more influential than the provost of University B and that [has] a big influence on what happens, their ability to bring the agenda forward. (Respondent 10)

Other respondents indicated that while executive-level champions were necessary for the kind of change represented by major distributed education initiatives, their efforts were not by themselves sufficient to ensure success. They emphasized the need to engage stakeholders at the departmental level:

> …from each discipline or academic school, you have to have somebody involved who is, of course, supported by the dean, but functionally is operating within a much wider circle, for example, within the provost's office. So, you've really got to have tentacles into the academic families or you'll just have lip service in terms of what people will commit to and what they will actually deliver. So, you had to have a leader within each academic school… (Respondent 12)

One respondent offered a warning on the danger of institutional leaders who might initially express support for distributed education (in this case eCA) but do not follow through by providing resources and ongoing support and visibility for such initiatives:

> …. [one challenge is] disingenuous leadership. So, for example, some…institutions who were strong in the beginning perhaps who sort of along the way subtly sabotaged things by withdrawing support, but not overtly withdrawing support. So, the people who are endeavouring to make distance education matter or distributed education matter are struggling to get heard at the VPA level or around the executive dean table, etc. So, one of the barriers I've seen is those people being continuously marginalized to the point

> where they simply despair and aren't able to be effective anymore. So, their voice becomes much more minimized. (Respondent 11)

When prompted to discuss leadership at the provincial system level, mainly meaning the ministry responsible for advanced education, respondents were somewhat more critical of efforts and shared several perceived deficits and recommendations for improvement. Unsurprisingly given the concurrent breakdown of eCA, many respondents also shared specific thoughts on leadership failures they believed to play role in the consortium's demise.

> [The ministry] never really spelled out what the strategy was where they as government would be indicating to the institutions that they need to align their thinking and this is the framework. eCampusAlberta provided them with a huge opportunity for that and they never leveraged it and that really, really hurt us because the institutions themselves, it seems, were not capable of doing it….I would say that in the same way the ministry for the last five years, seven years, has not set a strategy out for information technology for the sector, they have not set a strategy out for distributed education. And it really hurts. And they spoon-fed eCampusAlberta money for over a decade but never really said we're behind you. Here's the framework. (Respondent 10)

> I know if I was in their [the ministry's] boat, I'd want to be having some say in how the system is run and having some oversight, which they do. But I'd also want to be more…it's the structural pieces that are missing because they haven't been able to afford to put them in place. But they need to fund eCampusAlberta. We can't be the only province in Canada that doesn't have a coordinated, collaborative online

> presence…eventually, we're going to be left behind….That makes me sad and I think that is a place where leadership could and should be shown. (Respondent 06)

> If the government were to set that [target], with a realistic time frame, then leave it to those of us that are in the trenches to figure out what that looks like [it would be helpful]. We don't have a direction. It's like we're rudderless, and we're not sure where we're going….The province needs leadership and I told the ministry to set some targets. They can be lofty. We might not reach them, but set them. So, give us some guidance and direction specifically in the area of access for students and reducing cost for students….I think the government should step up and provide services to support high-quality course design whether it is online or blended or whatever. (Respondent 05)

While most respondents tended to support the idea of greater leadership from the province in moving forward a distributed education agenda, a few were wary of too much government intervention beyond the level of overall vision:

> …from my point of view, if they [the ministry] just jumped in front of a political success and waved the flag and left it at, that would have been fine. A bunch of us would have been fine with that, but when they got into policy direction particularly around tuition that's what made it really tough. And then following that up by clamping down on "this is all you can charge," but then not coming to the table with the differential required….I'm happy with any government…just jumping in front of the parade. That's okay because that gives you good profile, good press, and good awareness. But when they get into the operation…of a business that they have no experience in or don't

> understand or don't have economic advisers, then that is when you start to really see the decline in effective operation. (Respondent 12)

A final theme that emerged from discussion of leadership and both the institutional and provincial levels was the impact of unstable leadership due to recent waves of retirement at senior levels and a period of rapid turnover within the ministry. Respondents expressed strong agreement that such changes had negatively impacted attempts at progress in expanding distributed education across the provincial system and specifically within the CCIs:

> …I think one of the things, as we all reflect in our rocking chairs down the line, having 13 ministers of advanced education in 14 years says a lot. Because the system is turning itself around one way to respond to one minister's requirements. Boom. That person's out the door. So, you get this sort of start and stop mentality that after a while, the institutions just decided they couldn't keep responding to that until, you know what I mean that they, despite the changes coming down from the advanced education system, a lot of institutions have just decided they can wait the next guy out. (Respondent 11)

> [One issue was that] the government changes so quickly in Alberta [referring to frequent turnover in the appointment of the Minister of Advanced Education] and the other, of course, was the presidential and SAO [senior academic officer] leadership. The lobby support kind of went up and down, became weaker and stronger, with changed leadership….the support changed. So, it's managing now that evolution of leadership is what I think people are starting to see at this point in time. (Respondent 12)

> The presidents of the entire system have changed. There was a time when it was very familial….They were great times, but there was a close-knit group who trusted each other and worked with each other as presidents and it was very strong. (Respondent 11)

> I think I've had three vice-provosts teaching and learning since I've been here. So, the poor Center for Teaching and Learning, right? There is virtually no digital stuff happening because that's [not] his focus. They end up with this unit that sort of swings with whoever is leading them at the time. (Respondent 04)

> So there was a philosophical stance that was very much about supporting learners [through distributed education] and I think over time what I saw happen as those people retired or moved into different roles, that system memory left with them. (Respondent 06)

***Suggested planning questions***. Based on the findings related to the Leadership integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. Is the vision for distributed education clear to executive, faculty, and staff at this institution? What formal documents will be used to make explicit statements about the place of distributed education at the institution?
2. Are there effective champions within the executive team and senior departmental leadership ranks that will be able to effectively move a distributed education agenda forward? If not, how will we address this gap?

3. Are key leaders likely to be in place long enough to make progress toward distributed education goals?
4. Are distributed education plans sufficiently aligned with provincial direction to avoid conflicts with the ministry? Are there plans in place to mitigate sudden shifts in ministry direction?

**Technology**. This integrated concept refers to all issues related to information technology and its relationship to distributed education in Alberta's CCIs.

Table 9

*Technology Concept and Sub-concepts*

| **Integrated Concept** | **Level 1 Sub-concepts** | **Level 2 Sub-concepts** |
|---|---|---|
| **Technology** | • central IT services | |
| | • change | |
| | • cloud computing | • bandwidth<br>• virtualization |
| | • consumerization of technology | |
| | • deinstitutionalizing | |
| | • keeping up with technology | |
| | • mobile technology | |
| | • technology as strategy | • technology as power |
| | • technology infrastructure | |
| | • technology integration | |
| | • technology support | |
| | • ubiquity of technology | |

As Bates and Sangra (2011) note, information technology has come to have a powerful impact on post-secondary education, the advent of the Internet especially being a "paradigm shift for teaching and learning, to which institutions, administrators, and instructors are still

struggling to adapt" (p. 31). It was thus not surprising that nearly all respondents commented extensively on the topic of technology as a consideration in planning for distributed education. What was somewhat surprising to the researcher, however, was the degree to which the institutions represented in the study—especially smaller institutions—were still struggling to develop effective plans for implementing and updating technology to support both on-campus and distributed operations.

The CIPs published by the 11 CCIs provide some insight into the challenges faced in maintaining the technological infrastructure required to meet student expectations for both distributed and on-campus programs. These documents commonly expressed a need for greater provincial investment in this area to enable greater student access and improved learning experiences:

> Northern Lakes College utilizes information technology extensively to support the accessibility of programs and services. We continue to build on current technology infrastructure and utilize new or emerging technologies that enhance service to learners. Student engagement will be improved with increased access to computers, enhancing wireless access and upgraded technology in support of virtual and physical classrooms. (Northern Lakes College CIP, 2015–18)

> With our commitment to a highly flexible learning environment and experience, we are seeing growing demand on our information technology infrastructure as well as demand for additional capacity. Our largest issue is bandwidth; our pipeline to the internet must be able to handle more applications, and our Wi-Fi network must accommodate heavy

simultaneous demand for downloading rich media and other learning resources. We are addressing this.

In sum, we will invest $3.7 million in 2015–16 from internally restricted net assets to promote strategic, sequential, and enabling information technology capacity that backstops our learning vision. These include new or enhanced capacity projects in areas such as Virtual Desktop, Information Technology Disaster Recovery, Self-Registration and Infosilum, Streaming D2L Server Capacity, Course-Based Registration and Timetabling Program, Student Portal Enhancement, Intranet Development, and several others. The common theme among these projects is their enabling properties to support the College's any time, any place, any path, and any pace learning vision. (Bow Valley College CIP, 2015–18)

With Portage offering more of our programs using a blended-delivery or fully-online model, expanding and upgrading our IT infrastructure is essential. Even courses and programs delivered face to face have Moodle companion sites and available online resources and supports. Many students now expect immediate, individualized service and support for software issues, homework help and payment plans while sitting at their computers or using their tablets or mobile devices. Portage is making a concerted effort to improve our services and communications network by developing an intranet, expanding video conferencing and classroom infrastructure, and improving IT services at our main bookstore and library. The College is also continuing to explore an opportunity to collaborate with other PSIs to renew our current ERP system. (Portage College CIP, 2015–18)

> Key trends that warrant attention include…the rapid pace of technological change and its impact on student expectations and infrastructure investment (Keyano College CIP, 2015–18).

One respondent described the particular challenges of technology access (especially high network bandwidth) and support faced by CCIs operating in rural Alberta and the need for financial and infrastructure support if these institutions are to remain relevant within their regions:

> I'd go back to the SuperNet again and getting fibre optic cable or whatever the delivery mode would be. Getting high speed to people's homes. I think physical structures, and I know the red bricks would absolutely disagree with me, but I think they are on their way out. They're not needed. If and when the technology catches up in rural Alberta, having a place to come for maybe exam invigilation and maybe some support when needed, but all of that can be done online, now….There's a financial commitment to staying at the cutting edge of technology. Right now, we are making arguments with the province that technology should be part of our capital planning. Same as Athabasca should. It's not about buildings anymore. It is about technology infrastructure. That's where we need to keep ahead of the curve. And we're so far behind. And for us that is going to be crucial. So, preparing and trying to stay abreast of technological change as we can financially afford to do. That's a big one for us. (Respondent 06)

A similar sentiment was expressed in the CIP for another CCI operating in a small Alberta community:

> MHC has limited access to reasonably priced high-speed bandwidth. Other than through private ISP services there is no readily accessible means to expand bandwidth. Supernet remains an expensive option for us as we consider that network to access research networks and Internet exchanges. This situation has limited our ability to plan with certainty any full involvement in provincial shared data centre or related shared services initiatives. (Medicine Hat College CIP 2015–18)

The issue of bandwidth and participation in wider provincial initiatives raised in the Medicine Hat College CIP is significant given another frequent theme found in both CIP and interview data. Many institutional plans are focused on more efficient technological solutions through either shared institutional resources or cloud computing alternatives to traditional on-site technology resources—both of which require adequate network bandwidth to be practical:

> Olds College is a leader in piloting and adopting shared services for information and technology management. We have successfully partnered with Athabasca University for provision of our Learning Management System, Moodle, since 2010. We are the lead institution with Cybera and two other post-secondary institutions to bring EduRoam to small colleges. Our sharing network infrastructure and library services with Olds High School through the Community Learning Campus is a template model that can be adopted by other jurisdictions. (Olds College CIP, 2015–18)

> So, we moved to Google for Education which has been transformative for cloud-based collaboration. Our email is on Gmail and so that was a huge institutional benefit. (Respondent 03)

> Lakeland will be identifying and assessing emerging technologies such as "Cloud Computing," "Internet of Things (IoT)," and social media as means to reduce costs and be more responsive to the College's needs. Lakeland's Information Technology department is moving to a more efficient and effective operational future state. (Lakeland College CIP, 2015–18)

A frequent theme found in the interview data was related to the rapidity of technological change, related social and political change, and the challenge of sufficiently rapid institutional adaptation—including process, infrastructure, and culture:

> There is the whole question of technology readiness, and that's not my area, but obviously there have to be the technology systems to support distributed education. (Respondent 02)

> And how do you make both [innovational and institutional stability] possible? How do you? And I think in an area like education, because there is never a finish line, you can't assume that either technology or our subjects, like the clients, they are both rapidly moving and evolving targets. (Respondent 01)

One respondent expanded on this idea, indicating that meeting the challenge of rapid change was not necessarily about overcoming resistance but rather of helping people and systems to cope with a perhaps unavoidable period of ambiguity in post-secondary education:

> The whole thing around, and I wouldn't even call it resistance to change because in my experience with what happened here in the last couple of years, it's not even so much resistance to change. It's about what are we changing to, right? And believing in the vision of somewhere to go that hasn't been there, right? Instructors will say to me, "I'm

> all about change. I change my courses every semester. I'm trying to continually adapt to what's out there, I'm listening to industry, I'm listening to my students, I'm adapting, I'm current, I'm trying to be innovative. I'm doing all those things. I'm all about change, but I don't get where this institution is going, right?" So, they have a real—I'm very much generalizing here—but one of the trigger words around here is "academic transformation." And my message to them is that's not unique to us. That's the whole system trying to transform into something. We're just not sure quite what. (Respondent 04)

Related to the idea of technological change and resulting changes to educational practice, one respondent noted that another challenge resulted because not every new technology or innovation ultimately succeeds and finds a lasting place within our practice, making the "new normal" hard to grasp:

> Something came to mind when you were talking about how rapidly things change. In some ways things haven't changed that rapidly….MOOCs have kind of come and you still hear about it. Are they effective, are they not? They've kind of been here and they're still out there, but they're changing them. And you know, we had the video conference stuff going on and it is still sort of there and not….So a lot of those things are kind of there. It is like we've hit this point, and you think about things like simulations, virtual reality, and some of those—3-D—some of that kind of stuff that has potential….So we have those kinds of things, but we've had them for quite a while and they haven't really changed significantly. (Respondent 04)

Another theme that emerged from the data was changes in student expectations, often based on the rapid adoption of consumer technology and its ubiquitous presence in students

lives. This resulted in the expectation for highly flexible, distributed services in education even amongst those engaged in more traditional on-campus programs.

> The use of LMS has changed the game, too. I mean, you've seen this in your role more than most, but LMS used to be just for online learning. But now every course [uses the LMS]. (Respondent 03)

> They [students] do it [consume and create content on mobile devices] and I think they'll push us do more of that, right. Right now, you can do that on your mobile devices, but it definitely needs a lot of massaging to make it work and they are just technical fixes, really. That is really close. We're working with updating our Web and making everything Web-based. That'll happen definitely within the next year so where our content will be accessible, fully accessible, on their mobile devices. (Respondent 06)

> …humans are connected differently, that we communicate differently, that we experience digitally as much as we do any other way. And so, it's not just about choosing a learning platform or making your promotion mobile friendly or something. Those are really routine and pedestrian issues as a planning function. Because they have to happen, but you don't know what it's going to be because something might change. But how we experience the world, how learners experience the world, how learners experience each other in an institutional connection, that, I think, is what causes an institution to be interdependent. Because really, we exist, even at [college name], we exist in this physical space, but we also occupy a virtual space in people's hearts and

> minds and daily experience. And so, I think, when you think about an institution, you can't just see it as a bricks-and-mortar place serving physical people. (Respondent 01)

> The consumerization of technology and how that drives student expectations, right? I remember one day I was at a senior academic officers' meeting for something and I was doing a presentation on something; and I said I can join a social media network of a billion people in 10 minutes, but I can't take a course in another institution online as simply as that. (Respondent 10)

An interesting theme that emerged from only a few respondents was the idea that networked learning technologies can be "deinstitutionalizing," meaning that they may lessen the need for the infrastructure and systems usually associated with a PSI:

> …I remember everyone saying, "Let's put courses online and make lots of money." And the presidents came in sort of at a good time to say, "We're going to join forces and do this together." The problem is, and I don't think people necessarily realized this, I can put a course online and I actually can just build a website. I actually don't need to offer information to students; I don't need the structure of an institution. Now, it helps. There's credits, etc., but because anyone could do it, many individuals did. (Respondent 05)

***Suggested planning questions***. Based on the findings related to the Technology integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What technological systems will be required to implement the distributed education program? Will these systems meet the expectations of students and other stakeholders?
2. To what degree will students' own consumer technology (laptops, tablets, smartphones, Internet bandwidth) be a part of this system? How will the institution ensure student technology is sufficient for the needs of the program?
3. What institutional investments in equipment, support staff, software licenses, etc. will be required to implement the program? Are these resources both financially and logistically available?
4. Are there opportunities for greater cost efficiency through collaboration with other PSIs or through use of centralized cloud-based network and software services?
5. Are there any potential threats to established institutional strengths by adopting technology-based distributed education, e.g., will the potential deinstitutionalizing effect of networked learning technologies have a negative impact?

**Rationale for Distributed Education.** This integrated concept refers to the reasons actors within Alberta's post-secondary system might consider as justification for pursuit of distributed education options.

Table 10

*Rationale for Distributed Education Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Rationale for Distributed Education** | • campus space | |
| | • opportunity cost of non-participation in distributed education | |

One striking finding was the degree to which respondents accepted distributed education as the "new normal," to the point that its importance and continued place in the CCIs and the provincial system was taken for granted. Given the roles and backgrounds of these individuals, that position is understandable but also caused the researcher to wonder whether this might contribute to inaccurate assumptions about how other actors in the system perceive the value of distributed education—perhaps even weakening the emphasis placed on explicit rationale for these efforts when planning. The danger for CCIs is in pursuing distributed education out of a "felt need" rather than as a result of a critical examination of distributed education to meet established student or institutional needs and objectives.

One of the drivers for institutions pursuing distributed education in recent years has been the rapid advance and wide adoption of information and communications technologies, and the desire of PSIs to "keep up" with the technology used at other institutions, or at least not be perceived as offering students a less-than current range of learning options (Van Dusen, 2000). However, this has become ever more challenging (and expensive) as such technologies evolve and become obsolete in an ever-quickening cycle of "technology transience" (Swan, 2015, p. 139). Some of the potential benefits of information technology application in post-secondary education and the forms of distributed education they afford include greater access to and flexibility of programming, especially for those students who are unable to attend traditional face-to-face classes due to issues of work, family, location, etc. and lower costs for both students and governments (Bates et al., 2011; Kentnor, 2015; Van Dusen, 2000). Many authors have also claimed that superior learning outcomes may be possible through use of various media technologies in education, but results have been mixed and often disappointing (Mellon, 1999;

O'Brien, 2017) though the debate continues (Swan, 2015). Given the variable record of technology in education, it seems wise for Alberta's CCIs to critically assess the value proposition of any such initiative to all stakeholders rather than assume that more technology and more distributed learning options are necessarily beneficial to desired outcomes.

For those respondents who did comment on the reasons for pursuing distributed education, most viewed student demand as the primary driver:

> …it's student demand that drives that [distributed education]. I think it's the only thing with some of the people leading in leadership areas that will change their perspective on it. (Respondent 04)

> I think the students are expecting that [flexible and distributed options] to a certain extent as well. Maybe not all, but pretty close to all. When you think about complaints about instructors, every once in a while we have an instructor who doesn't put anything up on [the learning management system] and it's like the sky has fallen….Because the pressure from the students. Why isn't it on [available online]? (Respondent 04)

> But what I feel is a driver is that we live in a virtual world and so learning becomes more virtual. Your experience with humans becomes more virtual; your experience with learning becomes more virtual. The whole brand experience and college experience has all kind of become digital. And so, you have to plan for the social reality. (Respondent 01)

Respondents made little mention of exactly how evidence for the perceived drivers for distributed education was gathered or evaluated. One respondent openly questioned whether serious effort was made in this area of institutional planning:

> So even in…planning…we don't have an evidence-gathering theme institutionally that says we think these programs should be online and these ones shouldn't. Right now, it's up to the individual programs to go that direction. So, it would be up to the program chair and the program dean to bring it forward. So, we have a process in place that approves the development of online courses each year. [We] gather all that information from the deans and chairs—all the requests coming forward and that goes to our academic leadership team for approval. (Respondent 04)

Another issue mentioned by some respondents was of opportunity cost, meaning that, by choosing to not offer distributed education options, an institution could be missing a chance to serve its learners as well as grow in scope and influence. One unique take on this concept came from a respondent who believed that, while it might be a legitimate choice for some institutions to opt out of distributed education, it could result in a missed opportunity for faculty development and quality improvement:

> Now the only problem with an institution not being involved in distributed education, from my point of view, is that participating in distributed learning is an important organizational growth opportunity for an institution. Distributed learning triggers growth and development for the institution which does not occur if they're not participating in it. Triggers growth and development for faculty in ways that they don't necessarily understand or appreciate. So in order, for example, to offer an online course, an instructor has to deal with instructional design to an extent that he or she doesn't have

> to deal with it in a lecture course. And I would argue that that is, learning about instructional design for the online course, is good for the students in the classroom course. (Respondent 02)

Finally, respondents generally did NOT see reduced need for physical campus space as a rationale for distributed education. Most tended to see the future of post-secondary education as a blend of delivery modes, with continued strong demand for elements of an on-campus learning experience:

> It could well be that physically places aren't growing. But honestly, I don't kind of have a feel for any appetite on the part of students either to separate themselves entirely from a physical campus. (Respondent 01)

***Suggested planning questions***. Based on the findings related to the Rationale for distributed education integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What is this institution's rationale for pursuing distributed education delivery? Is it based on specific perceived needs or demands of potential students, increased access, provincial directive, enrolment targets, space considerations, costs savings, etc.?
2. Is there specific, credible evidence to suggest that distributed education will lead to such outcomes?
3. How will the institution measure or otherwise evaluate the contribution of distributed education to the attainment of such outcomes?

**Internal Environment**. This integrated concept refers to aspects of the internal environment at individual Alberta CCIs that impact planning for distributed education.

Table 11

*Internal Environment Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Internal Environment** | • institutional culture | • entrepreneurial activity<br>• faculty vs. administrative influence<br>• skunkworks<br>• values mission goals |
| | • institutional organization | • institutional size<br>• internal interdependence in DE |
| | • policy | |
| | • risk | |

One area of particular interest to the researcher was how the CCIs are both similar and different—and how any differences should be accounted for when planning for distributed education. Many respondents described institutional differences related to financial situations, regional demographics, access to technology, rural vs. urban location, relative size, etc. and how these differences impacted the value and viability of distributed education as a delivery choice.

> …in terms of differences is a great variation in size from 1,100 FLEs to 6,500 or whatever….They have great differences in their service regions so some have a service region of a million, some have a service region of maybe 100,000—would be for Northern Lakes and Keyano and Medicine Hat—100,000 or not even that. (Respondent 02)

Other respondents focused on the programming characteristics that differentiate the CCIs, noting that some are more comprehensive while others focus on niche programming aimed at specific stakeholders:

> I think another nuance that is quite different is that there's a few of us…that are quite unique in [our] program offerings. Generally, most CCIs have a plethora of programs

> that you could say that every community college has this. And that would include health and wellness, university studies, human services, business. [We] are not a community college in that regard. We have 30 programs, and we have none of those general-based programs. We have very specific programs. So, within the sector of 11 [CCIs], we are perhaps the most unique and other institutions would have between fifty and seventy program offerings, generally speaking. (Respondent 03)

Some also noted the difference in the historical roots of the institutions and how this differentiates them, even though they are now part of a single sector classification within the Alberta post-secondary model:

> The other difference is a historical difference. Some of the regional CCIs like Medicine Hat and Grande Prairie and Red Deer and so on were formed in the '60s in the very much the junior college kind of history. The transfer program and the diploma programs were their core offerings at that time. Five CCIs have their roots as Alberta Vocational Centers; two have their roots as agricultural colleges going way back in time. So there are very real historical differences, and those historical differences become cultural differences for the institutions. So in a place like Medicine Hat, for example, is very much in the transfer-program mode with the faculty that you associate with university transfer programs. They focus on, you know, they're interested in having degree completion or even degree granting if that was in the cards. Whereas, NorQuest and Bow Valley beginning as Alberta Vocational Centers with the primary focus on disadvantaged people, academic upgrading, foundational learning, English as a second language, short-term skill programs, very labour market-responsive kind of programming. So diploma programming, the sort of typical community college

> programming in any large scale, is relatively new for NorQuest and Bow Valley. Those two started as agencies of government. Now they are board governed like the junior college group were from their very inception. (Respondent 02)

Building on the idea of historical differences between the 11 CCIs, respondents highlighted the resulting cultural differences between the institutions and how this might impact their ability or interest to pursue distributed education options—especially where significant individual and organizational change is required:

> …he would repeat to me over and over, "You can never underestimate the weight of the culture. Never underestimate it." And I hear that often as I come up against things or see things is that there is a true weight of culture and organizational change is tough work. And if your organization is being asked to change in one direction and everyone sort of moves on the bus that way, then you have another [leader] come in or another direction and they move another way. And they get pretty change weary after a while. (Respondent 11)

> Not to deal in generalities, but people with a very classic academic preparation are often a bit skeptical of distributed learning. They, you know, would put emphasis on academic rigour where an institution with a more AVC-style history of development might put the access value on a higher plane.…[Y]ou've got to arrive at a culture where, you know, classroom face-to-face main campus during the week, off-campus delivery in Okotoks, distributed learning, all of these different modalities are part of the chairs and deans program delivery responsibility. And this is just one more delivery option added to their existing options. It is not off there somewhere separate, right. Because they've

> got to be motivated to be engaged, they've got to be accountable. You know, academic delivery, academic quality are their responsibility. So if you get in their way, they'll just back away. (Respondent 02)

Also related to institutional culture, a few respondents mentioned the need for some tolerance for risk and piloting with unknown outcomes in exploring new distributed education initiatives:

> I've worked in a couple of environments that have really given us the ability to figure things out. So the whole premise of a pilot is will it work if we do it this way? Or will this work if we do it this way? And so, two or three years ago at [institution name], the provost's office took a chunk of change and set up a digital learning pilot research and development team. And it was the weirdest group of people, ever. And I don't know how we were picked. I was asked to be on it. I was fairly new. There was head of Marketing and Communications; there was the Dean of Science. It was just sort of random people that had some expertise in the digital space. They gave us $2 million and the committee was chaired by the provost and they said, "Alright. What should we be doing in the digital learning space?" (Respondent 05)

Another theme related to the internal environment was development and adoption of policies and decision-making mechanisms that standardize institutional practices to support the smooth functioning of distributed education functions:

> That kind of whole technical process of deciding what you're going to support, what you're not going to support. Those kinds of things, much as it's a moving target, the sooner you can standardize those processes, the better….No matter when you start, you're always too late. But that part, I think is really significant. And then having a

> decision-making mechanism about how you prioritize resources. I think we may have come to that a little bit later than ideal. (Respondent 02)

One respondent noted that this need for internal policy on distributed education also needed to align with other provincial institutions to maximize collaboration and student opportunities:

> I think when blended and online learning have become just a way of how we do things and as long as the institutions have policies in place that enable students to take courses from wherever—yeah it's a little bit more work for them—but as long as the policies are in place, things like the residency requirements. Provincially or across all. (Respondent 04)

A final theme—which might be termed "institutional collaboration" or "internal interdependence" echoed findings from some of the researcher's previous work (Shimoni, Barrington, Wilde, & Henwood, 2013) investigating best practices in support of distributed learners. This is the idea that distributed education and the expectations it engenders in students tend to increase the "need for coordination and collaboration, both within and between institutions" and "across departments and systems" (p. 147):

> So, any process except the actual process of instruction is so colored and permeated by all of these technological components that one person or one department cannot deliver. Really, you're inevitably interconnected. And if you're not, you have to ask yourself how are you doing your work? How is that even possible then?...So, this has just made it so that no matter what your personal style or preference is, you just cannot move without the other people. And if we look here at [college name], you can't really develop curriculum of any kind without instructional designers, without media

> developers, without all sorts of technical support, without camera people. You just can't get through a day without that. (Respondent 01)

***Suggested planning questions***. Based on the findings related to the Internal Environment integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What are the unique features of the institution, including size, location, demographics, history, etc.? How might these impact the adoption of distributed education amongst various stakeholder groups?
2. What are the unique aspects of the institutional history and culture? How might these impact the adoption of distributed education amongst various stakeholder groups?
3. What institutional policies or practices exist to support distributed education functions? What new policies or decision-making mechanisms will be required to enable the intended initiative?
4. What changes will be required to internal institutional processes, coordination, and culture in response to the technologies or other innovations implemented as part of the distributed education program?
5. How might the working relationships between existing departments and functions be impacted by distributed education? How might organizational structures and relationships need to be adapted to enable the intended initiative?

**External Environment**. This integrated concept refers to aspects of the external environment that impact planning for distributed education at Alberta CCIs. This concept is considered separately from the "Provincial System" but is closely related to it.

Table 12

*External Environment Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **External Environment** | • changes in society | |
| | • demographics | • diversity<br>• First Nations |
| | • Economy | • jobs |
| | • enrolment trends | • distributed education as driver vs. response to change<br>• distributed education is no longer alternative learning delivery |
| | • geography | • service region |
| | • stakeholders | • employer relationships |
| | • student expectations | • physical campus experience |

Various elements of the "External Environment" integrated concept were discussed by the respondents, while also being commonly mentioned within the CIPs. All respondents commented to some degree on the rapid nature of change in their operating environment, generally echoing Alfred's (2006) assessment:

> Colleges and universities are surrounded by change and upheaval. Consider the array of change forces facing institutions and leaders at any point in time: demographic transition, shifts in values, globalization, volatility in economic markets, labor-force transitions, advancing technology, shifts in federal and state responsibilities and funding priorities, changing roles and relationships among educational providers, the privatization of public services, new funding mandates associated with safety and security, the changing regulatory environment, and many more. These change-forces are interwoven and are accelerated by the blurring of boundaries between domestic and international spheres in an interconnected world; policy arenas; and public, private, and

> non-profit sectors….Porous boundaries and increased ambiguity are part of this world. The combination of fast change and ambiguity in a world in which boundaries have little meaning requires institutions to monitor forces of change in the environment as never before. (p. 71)

Demographic issues were among the most frequently mentioned as part of the External Environment integrated concept in planning for distributed education, especially the impact of Alberta's increasingly diverse population:

> We have a much more diverse society in terms of the number of immigrants that we have and the number of different cultures that we have coming in. [College name] has been there a long time, but [college name] in the last five years is way more diverse than we used to be. So, in terms of second language kinds of things, cultural differences, all those kinds of things that I think as Canada become more diverse. (Respondent 04)

> All industries, or almost all industries, are affected by rapid technological change, considerable social change, different demographics, a lot of immigration. That has a huge impact on a society, expectations of, in our case, students…I think distributed learning is really doing more to mirror the real world, and that we are more global, we are more virtual. (Respondent 01)

> I think also you can look at the 11 [CCIs] quite differently when it looks at demographics. Some are tipped toward—they almost all have more female students than male students. But certainly, the urban centres have a much higher proportion of female students. (Respondent 03)

Other respondents highlighted the challenges that arise for smaller rural institutions dealing with increasing—but somewhat selective—urbanization of Alberta's population that leaves specific ethnic and cultural communities potentially underserved by post-secondary opportunities:

> …we have two populations with a very high birth rate in our region. So obviously the indigenous population is, I want to say four times as high, but it is very high compared to the non-indigenous. But we also have Mennonites. We have large pockets of Mennonites throughout our region and they have 10 times as high birth rate as the non-Mennonite population. They're growing. (Respondent 06)

> As soon as you go up north there's a higher proportion of Aboriginal students. And urban centres. Even within Lakeland College. There are two campuses. Vermilion is very, very Caucasian; and then you go to Lloydminster and 30 per cent are Aboriginal. (Respondent 03)

> It's interesting that our, especially our indigenous, populations are very stable. They don't move around a lot. Their support systems are here. They're not able or willing to go to an urban centre for their post-secondary education. I suppose if other institutions caught up with what we do and how we do it and they could access post-secondary from their home from other institutions that that theoretically could make us redundant. Again, I don't think I'm going to be out of a job anytime soon. (Respondent 06)

> Some of the Northern institutions—Northern Lakes, Portage—have a very strong connection from that perspective to the needs of that community particularly on the foundational learning side and typically as a result of stronger demand for it by First Nation learners in those communities, as well. (Respondent 07)

> Some of the strategic direction is related to the population of the region, the economy of the region and the scale and nature of the region. Is it a compressed population—in the case of Medicine Hat where probably eighty per cent of their service region population is in the city or Northern Lakes where it's dispersed over an area larger than some countries in Europe? And then, I think also that differences in strategic direction are a function of key players at various times. (Respondent 02)

Looking at Alberta's population and economic trends more globally, a few respondents commented on concerns for sustainability for some of the CCIs and the potential for eventual consolidation or rationalization of the system:

> …when we look at demographics within communities—and that we will only have a [single] corridor that will grow and it is Lethbridge, Calgary, Edmonton, and to a lesser extent Red Deer….And so, you create these situations where change is a result of a crisis of some sort. And that is fundamentally what it will come to. Politically, it's very hard. Are we going to close any institutions down? Well it depends on the community fundamentally. Communities are going to shrink. (Respondent 07)

> …I think there is a real belief in the system that students or applicants from rural areas can and will migrate to urban centres. You know, as populations have done. I think that our populations are, and I know there is a large urban indigenous cohort. But

> traditionally speaking our [regional] populations don't migrate, but there is still a belief that that is the most economical way to go is just to bring people to Edmonton and have them trained. Take their training there and then send them home. And so there is that whole loss of rural populations which is really disturbing and it is affecting people's quality of life where you can't attract qualified workers because they leave their communities for their training and they don't come back. And so those small rural towns and villages are starting to disappear. (Respondent 06)

> If all that matters, and I really dislike how post-secondary has been kind of reduced in the language of government to "just preparing people for the workplace," then you really don't need a post-secondary for very much because you only need one engineer for 250 laborers. It was a calculation I saw once. That is a pretty low percentage. How many engineers do you really need? Not very many. How many PhDs in education do you need? Well, probably even less. Right? So if that is what you're doing in post-secondary, the fundamental argument about academic excellence, freedom for inquiry, the social goods associated with that, are being completely moved aside. The only end that matters is an economic job end and consumers who are sharing that is what's the fastest way to purchase my way into a job. That's not going to lead to a system that we're currently building from the institution and government side. I think the two are absolutely in conflict with one another. (Respondent 09)

Related to the issue of sustainability in providing distributed education services, one respondent commented on the challenge of adequately staffing CCIs in rural locations, as requirements for sophisticated skills (such as information technology) become more essential to such institutions:

> …the challenge with these communities is getting the expertise, and we're starting to see that in the post-secondary system where someone is saying, I can't find a CIO. It is very hard for me to find a VP….And things evolve and change [like] the Auditor General requirements on security, and things like that. You just can't keep up….A couple of decades ago it was thought about moving everybody out of the country back into the cities and so they wouldn't have to deal with these small little communities anymore. (Respondent 07)

Several respondents noted the importance of evolving student expectations in planning for distributed education due to the changing nature of a society, where information and services are increasingly available online from a distance:

> I think the students are expecting that [online course availability] to a certain extent as well. Maybe not all, but pretty close to all. When you think about complaints about instructors, every once in a while, we have an instructor who doesn't put anything up on [the LMS] and it's like the sky has fallen. (Respondent 04)

> Pressure is coming from students. Right? Students are, "Wait a minute. Well, I don't want to live in Edmonton." And to me that will be pivotal. (Respondent 05)

> I think people would just be so puzzled [if they were required to come to campus to interact during an online course]. I don't think they'd even be mad…I think they would be more baffled because you can buy things, you can make reservations in a restaurant. What do you actually do where you have to be there, right? As a matter of course, it's

> just not how we behave. You don't [even] have to turn up for a date in person. (Respondent 01)

Some of these respondents also noted that changing student expectations regarding availability of distributed education options did not necessarily mean decreased demand for more traditional face-to-face learning and that the "on campus" experience would continue to have value:

> When institutions start really listening to what students are saying—they're not really saying that they want to go school online. They're saying that they want different options. (Respondent 05)

> …when the group that is in high school, that is sitting in junior high—high schools right now, or elementary schools right now comes into the post-secondary sphere and they look at it and they go why would I want to purchase everything from just one vendor?... And for distributed learning, I don't actually understand why you would want to make a case for a sole-source vendor. I think it would be off-putting. I think people would actually go off-shore and find more opportunities to buy what they wanted to buy if they could actually do it here. What they can't buy and I think it is a really important point, is the experience of being at a post-secondary. (Respondent 09)

> I don't think colleges have anything to fear, and I don't think that the presence of online learning options is going to keep a lot of students from not signing up at Medicine Hat College or Lakeland or Keyano, or wherever. You know, it seems like people still, even if they don't want to be on campus all the time, they still seem to ally socially to some

> kind of community presence and want to have something that looks like campus life even if it doesn't have any campus life features. (Respondent 01)

In a similar vein, a few respondents commented that the future of post-secondary education was unlikely to be made up of a dichotomy of on-campus versus distributed education, but was rapidly evolving toward a blended model focused on choice and access:

> We're kind of at the point now where the question is not should something be online or should we be offering this in a distributed fashion but, is there some reason why we shouldn't? So, the question has changed from this is a face-to-face approach—a course, a support area, a registration process— to where it's, well, of course, it has to be available in all modalities unless there is some reason that it isn't. So, it's really gone the other way, and I think maybe we've caught up to the world, or to the student. Because it's seamless. (Respondent 01)

> I truly believe that we have assimilated distributed learning into the academy, and I don't see us going back from that….It has become part of what we do. (Respondent 04)

Another common theme that emerged from respondent data was the need to carefully examine the economic sustainability of individual distributed education programs given that by their distributed nature, they must to compete with other CCIs as well as institutions beyond provincial borders:

> I can remember doing the locksmith program. There wasn't another one nearby, there was very little competition, and there was so much about that that appealed to the college because no one else was doing it at the time that it was really a no-brainer. Where they lost, and I don't know how effective the program is now, but it is tons of money to create

> because there were no other. And then you factor in, if I want to be a locksmith there is a hands-on component that I can't really do online, and I can't really move from Grande Prairie to [college name] for two years to take the locksmith program because I'll never make that money back. So, there is a whole struggle institutions have to go through trying to deal with this competition, meeting market needs and getting students. (Respondent 05)

> Are there market opportunities out there for distributed learning? So, if an institution only is considering business administration diploma by distributed learning, that market has sort of been saturated. So, is there something unique to an institution for which there is a distributed learning market? Some things that may not have a particularly strong distributed learning market. So there has to be some very serious market research done. It's just not a case of, well, we'll throw this up and "build it and they will come." It doesn't necessarily work that way….So, to the question about should all CCIs be involved, I think it is entirely an individual institutional decision. And when I get to your last question, I'm going to say that in all likelihood some will fade away in terms of their involvement. (Respondent 02)

***Suggested planning questions***. Based on the findings related to the External Environment integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What are the population and enrolment trends for the institution's region? Will distributed education programs mitigate the impact of these trends on the institution?

2. How diverse is the population served by the institution? Are there specific groups within the institution's region that could be better served through distributed education options?
3. Is the proposed program and delivery mode being driven by expressed student needs or expectations?
4. Will the proposed program lead to employment opportunities for students within the institution's region?
5. How will the location of the institution impact its ability to attract and sustain staffing required for distributed education programs?
6. How is the proposed program aligned with other CCI offerings? Is it situated within a unique niche or will it be perceived as increasing system redundancy?

**Governance**. This integrated concept refers to issues related to the governance and management of post-secondary institutions as it impacts delivery of distributed education, especially within Alberta CCIs.

Table 13

*Governance Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Governance** | • BoG autonomy | |
| | • autonomy | |
| | • centralization vs. decentralization | |
| | • collaborative governance | |
| | • committees | |
| | • control | |
| | • decision making | • role clarity |

| | | |
|---|---|---|
| | • faculty autonomy | |
| | • generative governance | |
| | • top-down vs. bottom-up | |

Topics related to governance in distributed education systems have been of interest to the researcher for most of his career in the Alberta post-secondary system, beginning with his early observation of the challenges institutions encounter in maintaining centralized control of curriculum quality. He watched similar themes of centralization, autonomy, and control play out during his long involvement with eCA.

In the view of most respondents, Alberta's post-secondary system could be characterized as somewhat decentralized and locally governed, the responsible government ministry providing base funding and overall direction (see discussion of the six-sector model in Chapter 1), along with mandate agreements and variable oversight, planning, and targets. As Parry (2013) notes, this style of government oversight provides the advantage of greater diversity and innovation within a system but may also allow for greater inequality and variability across institutions.

While respondents had definite opinions and ideas to share on the topic of governance, it proved one of the more challenging integrated concepts for them to describe with clarity and without contradiction. In general, though, respondents described the ongoing challenge of good governance within PSIs and their observed successful practices in balancing centralization and decentralization, levels of autonomy and control, top-down and bottom-up approaches to planning and change, and potential new models for effective governance in distributed education and post-secondary systems generally. Notably, many respondents reflected on the challenges encountered in the governance and administration of eCA and how these challenges contributed to its demise.

Commenting on the tradition of institutional autonomy in Alberta, one respondent wondered if this situation continued to serve the provincial system well:

> Alberta is a unique situation. Most institutions have enjoyed quite a bit of institutional autonomy and they buck against a centralized approach, but there are times when there is value in a centralized direction. And that would be the piece that I would say there's some program focus based on a system perspective that would be of value for the system and I would say that would be true for distributed as well. (Respondent 03)

A respondent with experience in several areas of the Alberta post-secondary system spoke about the challenge and potential political motivations inherent in government appointed PSI boards of governors:

> …the board-governed institutions were populated with people appointed by the government who were government supporters and, therefore, they didn't move their institutions in directions that were contrary to government wishes. I mean, there was a synergy there of the thought. And also, because the government knew that they could rely on their people to look after things, right. That's part of it. Second, it's something about the Alberta political culture, and it's something about the particular type of conservative political party and political culture we've had in Alberta. And then there is a real convenience to it as well. You have all these arms-length entities that are given money, or given legislation, or given broad parameters and then go manage what you do. And if a problem arises, the standard ministry response is it's under the authority of a board-governed institution—"Talk to your board. It's not our problem." …And, you see, this is where the governance system for post-secondary starts to work in its favour. Because under the PCs and perhaps under the NDP, the boards were always people who

> were supportive of the government. They were never challenging, overtly, the government. (Respondent 02)

The following respondents commented on the challenge presented when an institution shifts toward increased distributed education modes due to disruption of traditional roles, power structures, and organizational units—and the need for incentive structures to shift as well:

> I've seen that in spades [that a shift towards distance delivery is a threat and a constraint to the authority at the dean's level] and that's why all the financial reward system has to be tied to both in terms of campus delivery, online delivery and now hybrid delivery. Because otherwise it can be a threat in terms of the power structure of where the academic delivery might rest. And people are very suspicious of their standards and their faculty being moved to a more centralized distance delivery function….[F]rom each discipline or academic school you have to have somebody involved who is, of course, supported by the dean but functionally is operating within a much wider circle, for example, within the provost's office. So, you've really got to have tentacles into the academic families or you'll just lip service in terms of what people will commit to and what they will actually deliver. So, you had to have a leader within each academic school, but what had to follow that was a central investment from the provost's office as a reward that says you will get this kind of funding to develop these courses, not only for online, but for your campuses as well. That's how you could ensure quality standards so everything new was co-developed for classroom delivery and online delivery and hybrid delivery as well for that matter. So there had to be a carrot attached to it…
>
> (Respondent 12)

> But the whole question of balancing centralization and decentralization as an institution moving to distributed learning. So, the easy answer on that is create a distributed learning unit over here somewhere and they'll look after it the way Continuing Education looks after the night stuff. And that one doesn't work because it flies in the face of the deans and the chairs. It doesn't get all of the appropriate service and academic units engaged and so on. But at the same time, you can't decentralize it to the same extent that you decentralize delivery of a business admin program because there are services—academic and learner services—that have to be brought in to the distributed learning modality that aren't more tightly linked in that modality than if it is a campus-based delivery….We wrestled with that and, you know, we tried to get the right balance of centralization and decentralization. And what I learned was, don't get in the way of the chairs and the deans in terms of academic delivery. (Respondent 02)

One respondent discussed the innovation value of a committee that was outside of an institution's normal academic governance structure when seeking to develop plans for distributed education:

> [Our committee] sat there and thought, well, you go to the Horizon Report. Here are the big things in education. Let's explore them. And so you have $2 million. You actually are not, we weren't at that point, part of academic governance. We were part of doing what we needed to do, spending the money, figuring it out and then making recommendations back to the academy. And so we were given a lot of latitude and weight with the provost's office. (Respondent 05)

Another respondent offered a summary of the importance of accurate and shared understanding of roles as an important factor in good governance:

> Any governance work I've ever done—that [role clarity] is the number one question. It is almost without fail. I've yet to encounter an organization of any size where the question of role and responsibility doesn't come up. Ever. Every single person wants to do a good job and what they don't understand is what is my role and what is my responsibility particularly at a governance level. And that needs to be clarified for people. It should have some flex, it should have some play. But if you're trying to oversee individual contracts and run health care in the province, you don't have the capacity to oversee thousands of contracts. You just don't. So, what would be the roles and how do they interact with one another is one piece. What would be the appropriate levels delegation? So, within the actual delivery system, who are the entities that are going to be delivering and what will they deliver? And there might be rationalizations as we started off talking [about]. Respondent 09)

In reflecting on the role and potential failure of governance during the eCA experience, respondents provided many perspectives but tended toward a sense that the consortium lacked sufficiently strong leadership and controls to move it beyond the self-interest of individual member institutions. As we have seen, many indicated that stronger ministry direction and control would have been helpful in order to achieve a more rationalized provincial system for distributed education:

> It would be unfortunate [to require an external control level of governance that is beyond the individual presidents and boards], because I think if it was inspired enough [that would not be necessary], but inspiration and perspiration become a challenge just to get these things done. So that's why I lean towards that the ministry needs to be involved. The challenge, and of course my perspective is going to be informed a bit by looking at

other jurisdictions. Like it or not, in other jurisdictions, the government really does mandate what matters. (Respondent 11)

Well certainly the program rationalization has to happen institutionally but also at that provincial level so you are offering the right kind of programs. I don't know, is there value in the centralization of some of the services? I don't know. What's in it for us is what I keep coming back to. I'm not sure on that one; however, you think about efficiencies from a provincial perspective and the amount of money that all the different institutions put into developing online courses. (Respondent 04)

From a system perspective, I would like to see some kind of gateway to going online so that we avoid duplication….[In] Montana, when a new program is introduced, the institution that introduces it has full ownership responsibilities of it. So, it allows them to really regulate the supply and demand. Here, it's kind of free market once you go online. So on campus, we're restricted by now CCI mandates and regional zones. But as soon as you put it online, you're not restricted anymore so you end up having sometimes cheaper programs online where they're money making, but they may not be as high value or they may be lower quality, but they know that there are lots of people that want to take CALM 1010 online. And then other programs that should be online that there is some regional demand for are very expensive to offer and the funding may not be there to sustain it properly and develop it. But in the state of Montana, once one person owns it, they own all the mandates so they can either broker it, but they have to

give permission to anybody else. I'd love to see the online world like that [in Alberta]. (Respondent 03)

I think in some cases institutional autonomy and self-interest takes over—I think you're quite right about that. At a very personal level, deans and faculty and executive officers [say]"let's do it ourselves" and really don't think very strategically about it. I think that the lack of government mandate was a clear issue from my perspective…. And here we are in 2016 and it's no different, and we couldn't crack that nut, right? And some of it is about institutional autonomy. Some of it is about perceived inequity in quality or something, right?...The conflicting factor was that with the level of participation by some members of the consortium being relatively low, I'm not sure the business case was there anyway to invest in the automation of what it would have taken to make those processes more seamless. That was the rub, right? If everybody went all-in and it was significant benefit in terms of the number of people who would be interested in taking these courses and sections and wanted a seamless registration experience and so on, I think you might have had a business case there to make. But when you have one institution doing this many and another one doing a sub-set, that became problematic. I remember early on, it was interesting because the first thing that happened with eCampusAlberta was every institution wanted to put their so-called "loser" courses on it. (Respondent 10)

Certainly, [Alberta's] ministry, on any number of fronts—distributed learning being one, but lots of others—takes a very hands-off approach with the board-governed

> institutions….Government creates institutions. It appoints the boards. Its relationship is with the boards. If the institutions create an entity, a consortium of some type, that is a creation of the institutions and the relationship is between the institutions and that entity and that is not government's call. And it has a lovely easy logic to it, doesn't it? But there's a big problem. It means, then, that government ties its own hands in terms of identifying a priority like distributed learning and supporting an entity like a consortium to make it happen. And so that is part of the challenge that eCampusAlberta has had this last few years is that that new mentality of government means that they don't really want to support a consortium like eCampusAlberta regardless of whether they support distributed learning or not. And there's no sign as of June 2016 that the new government is going to change that. I mean, I talked to somebody in the ministry in preparation for this conversation just to see if there was any change coming and there doesn't appear to be. (Respondent 02)

Speaking more generally about the need for stronger provincial direction and support for distributed education, one respondent made specific suggestions:

> I think that what the province needs are two things: The province needs leadership, and I told the ministry to set some targets. They can be lofty. We might not reach them but set them. So, give us some guidance and direction specifically in the area of access for students and reducing cost for students. So, open educational resources and flexible delivery. I think the government should step up and provide services to support high-quality course design whether it is online or blended or whatever. Our digital presence is so visible and it is visible to the world and if we're not watching that, it's reputational. And so, if there was a central production shop for the province that any institution could

> tap into and get high quality resources—I'm not talking HD resources—I'm just talking good stuff like hire [college name] to do your media. I think that would go a long way. I think you would see people [have] more of a service mentality. So we're not trying to take over your courses, [rather] it is support and services. (Respondent 05)

Another respondent, while acknowledging the difficult balance of direction and institutional flexibility, used stronger language to express a call for greater provincial involvement to produce a more rationalized, better supported system of distributed education:

> When they talk about rationalizing mandates, institutions say I have to have the flexibility to meet the needs in the area I serve—which gets harder to define when you're online—but, that's the first thing they say. And then they say, I also have to have the flexibility to be able to customize to make the best use of the resources I have and the demands of the [student] needs. So, people want flexibility to be responsive and customized, which is expensive, but I'm not sure that they want, especially colleges and technical institutions, it to just be a free-for-all. And I think there is that sense of, to be colloquial, if Advanced Ed had the balls, they would direct something. And, if you direct something, you put your money behind it or you either find another incentive, often money or you find a consequence of not doing it. (Respondent 08).

While the majority of respondents believed greater provincial direction and leadership for distributed education was needed, one respondent believed eCA would have been better off with less provincial involvement than it received:

> …compared to Ontario, I would say one of the problems is [eCampusAlberta] did have an outside authority and that was the ministry once they became involved. Because you could see the influence they were having in terms of what the consortium was to be

> called, the annual reporting had to go through the ministry, published by the ministry. Look at the annual reports. The opening address is from the minister, the 10-year celebration media event was all run out of the ministry. In some ways, it did have a form of central authority. How effective it was at an operational level, I'm not so sure. But you see, in Ontario they had none of that. Absolutely none. They do now, but that is the more recent years. So honestly, I think if Alberta would have been allowed to set it up as an independent online delivery consortium charging the necessary fees and limiting membership to only those who wanted to be involved, in my opinion, it would have been a lot more successful. (Respondent 12)

Finally, one respondent offered a metaphor that struck the researcher as highly relevant to the question of how best to organize and govern distributed education across Alberta's post-secondary system. He proposed that often, we seek to build systems by combining existing entities—much like breaking eggs to make an omelet. However, this approach may create significant operational and governance issues:

> The challenge in a society where history is present, in other words autonomous organizations like [college name] have been autonomous for a hundred years [is that] telling them that they now have to lose that and be part of the happy collective is not likely going to be what they are real keen about….And so when you say let's come together, people feel that what they're coming together as if somebody's going to break us all up and make us an omelet so that we're all the same and lose our identity. They're going to fight tooth and nail for that. So, the classical way of leading this, I think has got to be put out of play which is when you talk about leadership it is bringing people together under a happy collective mission with common vision and outcomes and we'll

> all figure out how to work together. I think that's dead before it starts because this group is not believing that they want to work together because why would I want to do that? Right, let's come together and we'll all be an omelet. No, I don't really want to be an omelet. I actually have something that I'm proud about, something that's unique, something that consumers or learners have told us is very valuable, our culture—all that kind of stuff—are the things that people will identify with and want to hold on to. (Respondent 09)

Instead, the respondent advocated better understanding of the unique properties of each entity and building a system that defines, respects, and encourages collaboration across their boundaries so they can function together—analogous to an egg carton:

> But the new approach is one of, well the term I use and I don't like it but I can't think of any other term for it, is metamobilizer. Meta talks about the space in between. That's what meta refers to. It is the space in between things. And mobilizer it's just somebody who can actually bring that space in between things into action. So, it's not just go well "yeah, they're not the same," and acknowledging the space. What are you going to do about the space? And the thing about that is where I move from the omelet to the egg carton is that the new set of behaviours are not about talking to the eggs about how great it is to be an omelet. The new approach to this has to be talking to the eggs about how great it is to be an egg. You're a fantastic egg. And our eggs, when we bring them together like this are actually safer and they're better, but they are organized in an egg carton….It works as kind of a metaphor to think of the carton because it serves to hold things together in a particular shape and form, it hasn't messed with any of the unique features of each of the things in the carton, but they have a collective kind of purpose

> and identity. They're not individual eggs anymore. We call them an egg carton or a dozen eggs. (Respondent 09)

The egg carton metaphor opens the door to some interesting questions about how we might organize the Alberta post-secondary distributed education system in the future:

> So, changing our perspective is a behaviour change unto itself that is going to take a while, but if you do know what you're getting yourself into generative governance starts to build the relationships and identify the boundaries that you're going to have to encounter and what is our response to the boundary spaces? That is kind of the political stuff again. How do we respect boundaries but also create opportunities for exchange across those boundaries? And which boundaries do we have to maintain and which can we let go? Those are really important. Which boxes do we really want to keep reinforcing and which ones can we amalgamate or change or do something with? Then collaborative is okay, there are lots of other people out there with egg cartons, too. How do you start to think about that and create the infrastructure to connect those up in new and interesting ways? And that is where legislation starts to be one of the tools to articulate that. As a society, we would like to connect, you know, health up, education up, post-secondary's up in these kinds of ways for these kinds of outcomes. (Respondent 09)

***Suggested planning questions.*** Based on the findings related to the Governance integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. Will the institution adopt a centralized or decentralized approach to governance and administration of distributed education? What are the advantages and disadvantages of each approach within the specific institutional context?
2. How will existing roles, committees, and organizational structures or hierarchies be impacted by this decision? Will any new roles, committees, or organizational structures be required to provide effective governance?
3. Will all distributed education be governed within a single structure, or will some innovative or pilot programs be given greater autonomy? If so, how will such initiatives eventually be reintegrated within the institutional governance structure?
4. Does the proposed distributed education program overlap with any other Alberta PSIs—especially within the CCI sector? If so, is any coordination of programming required? Are any partnerships or collaborations possible? How will these be handled in the absence of eCampusAlberta?
5. In a post-eCampusAlberta provincial system, what new structures or working relationships should be considered between the PSIs—especially with other CCIs? What messaging regarding distributed education governance should be communicated to the ministry from the college executive team and board of governors?

**Academic and Delivery Considerations**. This integrated concept refers to issues related to teaching and learning for distributed education within Alberta's CCIs.

Table 14

*Academic and Delivery Considerations Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Academic and Delivery Considerations** | • business models | • affordability<br>• cost vs. benefit of distributed education<br>• distributed education as competition for traditional classroom<br>• faculty compensation<br>• international education<br>• investment<br>• partnerships<br>• revenue generation<br>• scalability |
| | • faculty and staff | • professional development |
| | • instructional and delivery model | • access and flexibility<br>• alternative credentialing<br>• applied research<br>• delivery mode<br>• program design<br>• quality assurance<br>• teaching and learning<br>• transfer and PLAR<br>• trends in higher education<br>• workplace learning |
| | • support units | • centralized learning technology services<br>• copyright<br>• online registration<br>• shared services<br>• student supports<br>• systems |

One of the most interesting findings for the researcher was the orientation of respondents to academic matters. While analyzing the interview data, it became apparent that, although respondents were keenly aware of pedagogical issues in distributed education, they tended to focus more on issues related to enabling effective pedagogy—innovative and sustainable business models, flexible delivery and instruction models to promote access, quality assurance,

and organization of appropriate student supports and institutional functions to serve distributed learners—rather than pedagogy itself. Given that the respondents selected for the study were largely in senior leadership roles charged with financial and operational effectiveness, this is perhaps not a surprising result. However, another possibility is that many issues of teaching and learning in a distributed environment may have reached an accepted state of practice and are no longer as salient to leaders at this level. This question will be addressed as a possibility for further research in the next chapter.

In discussing whether distributed education (especially workplace-based) posed a threat to institutions that viewed their on-campus teaching and learning experience as their greatest strength, one respondent offered the following insight on the future of post-secondary learning systems:

> I wouldn't see that as the biggest threat to higher ed right now. I would say the bigger threat is thinking that our old business models will provide us what we need going forward. I think it is the reticence to seeing things in a new business model….I actually believe the future higher ed is to come up with different business models….higher ed has [traditionally] said "I want this dedicated space to use only for teaching and learning." And so as we look to the future, most of the expensive higher ed has been with fixed, single-use expense….Most of our single use space is way underutilized and if we can share that with industry, then we become viable. Especially if we own the building and rent it to them and then use it as we need it. So right now, we have 527 documented partnerships at [college name] and as we go forward with every program model, I try to build it as if there's no government funding….I need to build models with industry that

> give them meaningful skills that doesn't water down any of the academic requirements, but the model allows for less tax payer subsidy. (Respondent 03)

The same respondent viewed workplace-based distributed education partnerships as potentially superior academic experiences that carried less economic exposure for both students and institutions—and thus taxpayers:

> They [students] used to be on campus eight months, and we had trouble filling enrolment. Now we're oversubscribed. Our instructional exposure is smaller, the student experience is deeper, and the employers agree to give them one day per week to work on their studies while at work. Less loans, less housing, less food, they are working longer, they earn eight months of income instead of four months of income. Everybody wins and, quite honestly, they are a better employee when they get out. (Respondent 03)

Another respondent discussed the potential for distributed education and other innovative educational practices to play a greater role in lifelong professional development—and the need for post-secondary institutions to adopt these practices in order to meet student and employer needs:

> …things are changing so quickly so that whole professional learning piece that people will have for their whole lives….So that whole professional learning piece where people are working and taking a course here and there—those kind of micro credentials. And then you get into the whole credentialing piece. Like me building my own area of expertise around something so in the future, for example, will employers want to see credentials? Much like universities now that don't require you to have a high school diploma. They just want you to have Math 30 and English, whatever the numbers are

> now. They want you to have those things so an employer doesn't necessarily need you to have a degree in business, but they want you to have this skill, and this skill, and this skill. So where do those co curricular transcripts, the I'm-going-to-build-my-own-credential kind of approach to the world. And that goes back to some things we've already talked about with PLA, experiential learning, and the co-op programs. (Respondent 04)

An issue of particular concern to respondents was student access to post-secondary learning and the potential for distributed education to increase access through greater flexibility of program delivery:

> Really it is all about access for us. Every program that is developed, we look at how to make it as accessible as possible to the most number of applicants feasible within our service region. And I don't see that happening in other institutions. (Respondent 06)

> The word that comes to mind for me is choice, right? And that comes back to the diversity in our students that I think is probably only going to continue to increase, not decrease. I think when we talk about active learning and the way people learn, I wonder about what the impact of things like iPads. You see the two-year olds running an iPad, and what's that going to be like by the time they hit Grade 12 and hit post-secondary? So what they are going to bring to this? So I think there's that whole piece as well as it is hard to predict what those needs will be and what their expectations will be in five, ten or fifteen years when they hit here. I don't know what the answer to that is. Because of that it often comes back to choice for me. We need to be able to provide enough choices that people get what they need. (Respondent 04)

> If you believe in distributed learning…then I think that would suggest a need to at least determine if there is a demand…anybody who ascribes to an access philosophy should be willing to investigate that need both from an opportunity and a demand side, then you feed in the obstacle side—like is it worth it? And we're focusing on distributed/online, but it's also important for the integration of technology and face-to-face learning. (Respondent 08)

Another respondent, looking at the importance of access from a provincial-system perspective, noted that options—including distributed education—would need to be found to continue to provide appropriate access to post-secondary learning across the province but that new possibilities would need to be explored to deal with the potential for redundancy and inefficiency as individual institutions seek to provide greater access to programming:

> If you're a foundational learner, you're not going to leave your home. And so, we have to be cognizant of what level of learning are you looking for and where can you [as a student] realistically think of going. You're not going to take Imaging Technology anywhere but NAIT or SAIT because fundamentally the province can't afford to take it anywhere. But as learner you can go there because the likelihood of you finishing with a job capable of paying off any debt associated with that parchment are going to be in your favour. You may not do that with a Human Services or Child Care certificate or diploma. And that's going to have to be provided in a dispersed nature back into the communities because the learners associated with that are going to likely be rooted in their communities. There's where their opportunities are….You'll go to university for a Nursing degree because your pay scale is going to be a lot different, but a Health Care

> Aide? ...But it comes back to there's got to be a fundamental shift away from ownership to access and we refer to it as, "is it the institution that is important or is it the access within that?" (Respondent 07)

A similar sentiment was expressed by another respondent with experience in several institutional and provincial-system roles:

> …from the ministry point of view, they would want to see that the students in the region with a college that is not pursuing distributed learning would have access through the other parts of the network, the system. So, you know, if Medicine Hat [College] opted out, [the] ministry wouldn't want students in Medicine Hat that want to do a business administration diploma to not have access, but be sure that they had accessed through SAIT or NorQuest or somebody. (Respondent 02)

Another commonly expressed thought on academic issues was the importance of quality assurance in distributed education and the important role that eCA played in advancing that understanding across the Alberta post-secondary system:

> CCIs were not talking about quality standards until eCampusAlberta came along and brought in quality standards for online delivery. Now, some of those institutions have virtually adopted eCampusAlberta's quality standards for all delivery, irrespective of modality. (Respondent 02)

> Quality of what went online increased with eCampusAlberta. (Respondent 03)

> eCampusAlberta created the conversation, created the concept of a standard of quality, and built an understanding of what it took to actually put [up] an online course. (Respondent 07)

> So I did want to stress…I think the other thing that it [eCampusAlberta] proved which is essential is quality assurance…standards were developed and agreed upon. (Respondent 10)

One respondent commented on the need to pay attention to pedagogical differences in disciplines, arguing that not all subjects—in this case second language learning—are as amenable to distributed delivery:

> …it's just a little bit more surprising, I think, in language training—just how much content can you actually put online? There is a real technical part of it. Which is, how do you, in fact, do listening and speaking in an interactive fashion online? Because the method is so focused that some of the actual objectives of your course are more challenging to meet—or more technically demanding to meet…There's not yet within this particular discipline even enough of a shared understanding to work between institutions, yet, and know exactly what each other are talking about. (Respondent 01)

Several respondents commented on the tendency for distributed education to drive a greater need for coordination of various academic and non-academic support services for students, some of which might never be on campus—and the logistical and financial challenges provision of such services might entail:

> The other thing that's really important to consider when planning for distributed learning is engaging—no, not engaging—expanding the scope of the core learner and academic

> services so that they see distributed learners as much part of their mandate as all other learners. So, the registrar's office has got to make business process transformations. Financial aid, the list goes on. Ten, fifteen different areas where they've got to change their business processes to serve an added learner group, and an added faculty group if they're an academic service. The library is the most obvious one but often the easiest one. (Respondent 02)

> And then the response isn't always that we can provide everything for the student that isn't here, but you have to start with that and then you back up to what you can afford. …But we also have to start with the assumption can we put it all online, right? And then you back off how much you can. But it has to begin like that. And the same with counselling. You know you can do counselling on the phone, you can do Skype counselling, you can do career advising. There is nothing to prevent that, right? So you have to begin by saying, okay, well we have counselling services. What are we doing online? If you can't afford or need to back off for some reason, you back off. We have to ask from that vantage point, right? (Respondent 01)

Faculty support and training to effectively engage in online teaching was another common theme, several respondents indicating that this usually requires increasingly focused and coordinated approaches to ongoing faculty development:

> In the early days of eCampusAlberta, [college name] didn't really have a coordinated approach, but out of the work for eCampusAlberta they determined it was really necessary to have a coordinated approach and to support professors in all types of

> delivery: face-to-face, etc. And so, the Center for Teaching and Learning was born eight or nine years into e-Campus' life. (Respondent 05)

> I think that a second thing would be the institution's readiness to support instructors and staff and its readiness to make the innovations necessary to support instructors and staff. That's a little bit different. So, if an institution is just dabbling with distributed learning, but they want to make an organizational transformation, then they have to understand what's involved in instructors and staff becoming really engaged in distributed learning. And they have to understand the implications of the faculty and staff development required to become a really distributed learning institution. (Respondent 02)

> I think a commitment to staff training insofar as it is appropriate and knowing that it's not every department, not every area, not every discipline is going to have the same needs at the same time. So, maintaining that resolve and having the support, but not making the assumption that everybody is going to come at the same pace, I think is really important from an institutional perspective. (Respondent 01)

One respondent commented on the need to be aware of faculty collective agreement terms and conditions to be sure that any planned delivery models would not create workload or compensation issues:

> …but there was some conversation about how is that [online teaching] integrated in faculty workload. And it is still not there, and there is still no common agreement across campus. We have some centres who will actually, when we have a high enrollment course like the sociology/psychology; they can actually do it as part of their workload.

> But they are the exception. They are not the rule. In some other areas, the instructors have their regular workload and then they do the DL on top of. So probably about five years ago, we came up with a formula that works to pay them. It used to be simply by experience [and] based on number of assignments and that kind of stuff. It was so subjective that the chairs who were assigning workload had people who would say we think it is a level five when in reality it was a level two just because they really wanted this person to teach. So, it was this big mess…this new one seems to work better. The old instructors still say they are being underpaid. (Respondent 04)

Finally, comments from one respondent seemed to the researcher to summarize many of the developments in distributed education within Alberta's PSIs and much of what remains to be accomplished. Engagement in distributed education has become the "new normal" for most institutions, but change is slow, and many adjustments in academic, institutional, and system practices still need to adapt to this reality:

> I think, I hope, that distance and online learning is no longer the new kid on the block. It's taking up the block. It's in a new place and space where especially with the learners coming up and the immediacy, the just-in-time, the badging, the different credentialing that is happening, it is morphing and disrupting the way we do business and I wouldn't be very popular with [my superiors] if I said this, but I think it is about goddamned time, really. It is. The inefficiencies are just something to marvel at and it's unfortunate. Inside institutions where if we could really turn our attention towards learning mattering, if you will, or those outcomes and measures, I think there is hope in that….somehow just putting out the fires with your faculty and your union or "your this" or "your that" has to

become less important than serving the learners. And I don't know how we get that to happen. (Respondent 11)

***Suggested planning questions***. Based on the findings related to the Academic and Delivery Considerations integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What are the potential academic consequences of any innovative business models or partnerships for distributed education? What unintended consequences should be considered?
2. Would distributed education increase access for students in programs under consideration?
3. Are there opportunities to use multiple forms of distributed education, such as online and workplace, to better achieve learning outcomes or increase access and program flexibility?
4. How will quality be maintained in distributed education programs? What standards will be used and how will ongoing quality be measured?
5. What are the unique pedagogical requirements of the discipline being considered for distributed education programming? How will these requirements be met in a distributed environment?
6. What student support services (registrar, counselling, library, etc.) will need to be adapted or coordinated to meet the needs of distributed learners?
7. What additional faculty supports might be required to ensure quality teaching in a distributed environment?

**Costs and Funding**. This integrated concept refers to issues related to financial considerations for distributed education, both within Alberta CCIs but also across the Alberta post-secondary system.

Table 15

*Costs and Funding Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Costs and Funding** | • efficiency | |
| | • financial management | |
| | • funding reallocation | |
| | • scale | |
| | • sustainability | |

In discussing challenges associated with planning for distributed education, all respondents commented on the central importance of financial considerations. These concerns were expressed not as simply a need for additional funding (though this was mentioned often), but more frequently took the form of how existing provincial funding might be most effectively distributed and managed within the system to produce sustainable results at the necessary scale of operations to serve stakeholder needs.

One commonly expressed concern was the challenge of balancing local access against the potential for increased efficiency through distributed education, raising the possibility that the many overlapping mandates of the CCIs could be inherently inefficient given Alberta's current demographic trends:

> I think the way that Alberta's population is distributed we're always going to have huge inefficiencies because all of these comprehensive institutions really are too small to be

> comprehensive, and it doesn't make sense for them to be comprehensive. There's not enough people to serve. (Respondent 01)

Related to this theme, respondents highlighted the inherent conflict between planning for efficient system-wide access through individual and provincial investment in distributed education and the reality of institutional independence, competition, self-interest, and survival.

> I think that after the seven per cent cuts most of the system was in shock. And they began to really try to look at what could they afford and there were large layoffs and cuts and challenges and even though that seven per cent was returned to the institutions, the pathway to become more centric had already occurred. And I haven't seen much will to come back to a system. People are very focused on survival. They're feeling that there has been cut after cut after cut and so they are looking everywhere they can do cost savings. Anything that is not core is dispensable and out of respect to them, many of these institutions are serving numbers that are maybe 20 per cent higher, thirty per cent higher than they are funded for. (Respondent 11)

> …really most of distributed learning is "chase the money." So, yes, meeting the needs within our region is very important, but if we didn't have that money, we would have to decide what would we stop doing so that we could do this. And when faced with those rationing decisions, you find out what's more important….[I]t's important, and it's important to our region, but if we didn't have that money, then you'd say how important is it would be the next question. Would I give up an on-campus program to offer it to one-third of the students off site? (Respondent 03)

> …there are huge opportunities with information technology to reduce costs to go to shared services and so on. And in many jurisdictions, that has absolutely been mandated including again, BC Campus as an example of that. The proof is in the pudding. Those guys have saved money because of it, right. And the technology today has developed in such a way that you can get reliable shared services. So, it's not unique entirely to e-learning, but nevertheless I think that institutions have that cultural component you were describing that's sometimes a bit unfortunate and a bit self-serving. And believe, I guess that it's in the interest of their students, but always I don't know if they are being a bit disingenuous about that sometimes, probably. (Respondent 10)

When asked about the potential for efficiently funding centralized distributed education operations by redistributing a percentage of each institutional grant, respondent views were mixed—again highlighting the tension between system and institutional perspectives:

> I would be willing to do that [have each college budget reduced to fund centralized distributed learning operations]. I think most would **not**…[B]ut [the ministry] has talked about it at our meetings….If there is no new money, what if we just took that money off the top of your grant. (Respondent 06)

As mentioned, interviews for this project took place during a period when it had become widely known that eCA would almost certainly cease operations within a few months. This led many respondents to reflect on the original goal of the consortium to increase collaboration and efficiency (and potentially revenue) in distributed education and the sustainability challenges that led to its decline. Of particular note was the general consensus that system-wide solutions would require greater provincial support and direction in order to realize their efficiency potential:

> Well, I think in both approaches you talked about, the key is sustainability. If my institution started to go in a direction of maybe putting courses online and we develop systems and processes, at what point is the university going to see a return on that investment? Or are they? College? And I think in the early days of e-Campus Alberta, everyone thought there was going to be gobs of money coming back to the institutions. (Respondent 05)

> And so, the ugly question of sustainment comes up and you start to ask those questions about the business model, and you start to realize that really it just doesn't make sense. There is just no answer for the questions that were being raised. And that is essentially what happened in the end [to eCampusAlberta] is that some institutions simply said we're not going to do it anymore. Because not only is it not making economic sense because we don't see the benefit anymore, but all the principles that we started with are lost. They're gone. So, we're not going to essentially take a loss to prop up something that now has simply faded away. And that is essentially what happened. And then, of course, the fact that the government is not interested anymore. There was a time and you'll remember this when substantial flow-through funding came from [the ministry]. (Respondent 10)

***Suggested planning questions***. Based on the findings related to the Costs and Funding integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What is the purpose or rationale for the proposed distributed program? Is it primarily based on serving stakeholder needs, or pursuit of funding opportunities?

2. What is the proposed business model? Specifically, what are the anticipated revenues and expenses for the proposed program?
3. What assumptions are being made in calculating revenue, expenses, and scalability? If these assumptions change over time, how will program sustainability be impacted?
4. Could program efficiency and sustainability be enhanced through collaboration with other PSIs?
5. What are the political implications of not seeking inter-institutional collaborations or other forms of provincial system efficiency?

**Innovation**. This integrated concept refers to issues related to changes in practice intended to produce superior results in the delivery of distributed education within Alberta CCIs. While it is often mentioned in conjunction with information technology, it is distinct from that concept in that it can refer to any change in practice.

Table 16

*Innovation Concept and Sub-concepts*

| Integrated Concept | Level 1 Sub-concepts | Level 2 Sub-concepts |
|---|---|---|
| **Innovation** | • innovation vs. activity vs. planning | |

The concept of innovation was only addressed directly and separately by a few respondents, whereas most others tended to bring the concept up in relation to information technology. Still, it emerged from the data as a distinct idea that the researcher could not reasonably combine with any of the other integrated concepts and which he believed to be of sufficient value to merit consideration in a distributed education planning process.

The decision to include innovation as a separate integrated concept is based on the inherent challenges faced when established players in any market seek to introduce innovative practices to remain relevant and competitive. Christensen (1997), in his widely cited exploration of disruptive innovation, defines innovation as changes to any of the "processes by which an organization transforms labor, capital, materials, and information into products and services of greater value" (p. 9). The thesis of his work is that larger, established market players tend to focus on incremental changes that improve and sustain their already successful models of operations over the short to medium term. Newer entrants and smaller players within a market are more able to engage in higher-risk disruptive innovation—changes that may result in lower quality or difficult operations in the near term but have "other features that a few fringe (and generally new) customers value" and which are "typically cheaper, simpler, smaller, and, frequently, more convenient to use" (p. 11). The established players thus face a dilemma: introduce disruptive practices that may initially lower the quality of their product and disappoint existing stakeholders, or introduce only incremental changes and risk becoming less relevant to the same stakeholders over time.

Christensen has more recently used this perspective to examine the potential for disruptive innovation in education (Christensen & Eyring, 2011), arguing that post-secondary institutions:

> …must change more quickly and more fundamentally than [they have] been doing. Invaluable strengths notwithstanding, the way [they have] historically operated has become too expensive….Now innovation is disrupting the status quo. For the first time since the introduction of the printed textbook, there is a new, much less expensive technology for educating students: online learning. Simultaneously, more outcome-

> oriented accreditation standards have begun to level the competitive playing field; it is no longer as important to evidence educational capacity via brick-and-mortar facilities and Ph.D.-trained faculty as to demonstrate student learning. The combination of disruptive technology and increased focus on educational outcomes opens the door to new forms of competition, particularly from the private sector. (p. xxvi)

Although Christensen's views on disruption in post-secondary education have received strong and convincing (to this researcher) criticism (Bucknell, 2016), they provide one important perspective in planning for distributed education. This is especially true given the interest and emphasis often placed on educational innovation and institutional cost control by governments and public policy interests (Axelrod, 2014; Bloom, MacLaine, Muzyka, Stucky, & Watt, 2016; Mrig & Sanaghan, 2017).

In discussing innovation, respondents tended to be most concerned with the challenges inherent in introducing novel ideas and practices within the long-established, complex systems found in PSIs and the provincial post-secondary system. Frequently, respondents viewed this as an organic and iterative process that may be difficult to implement strategically—largely echoing Christensen's (1997) thesis:

> How do we avoid strangling our own innovation?...The challenge around being out of the box while at the same time creating this efficient "highway" where everybody is driving the right way and the right speed, in the same direction and you know, more or less, how long it will take you to get there. So, obviously every organization—and this is where maybe the uniqueness depends on what you value—but I think every organization then has to grapple with these two sort of counterintuitive ideas: that you should all be innovative and do things that nobody else has done while at the same time

> maintaining some level of efficiency and cohesion to be able to have a sustainable and easily applicable model. (Respondent 01)

Other respondents emphasized the importance of intentional support for innovative practices, especially willingness to financially support necessary development of faculty and other staff to deliver innovative distributed education:

> I think…the institution's readiness to support instructors and staff and its readiness to make the innovations necessary to support instructors and staff.…So if an institution is just dabbling with distributed learning, but they want to make an organizational transformation, then they have to understand what's involved in instructors and staff becoming really engaged in distributed learning. And they have to understand the implications of the faculty and staff development required to become a really distributed learning institution. (Respondent 02)

Finally, respondents commented on the need for leadership mindset and institutional culture that genuinely supports innovative practice:

> So, I think institutional culture is significant as it relates to willingness to innovate, willingness to take a risk, a willingness to consider that learning can occur in all kinds of modalities, not just a conventional classroom, Monday to Friday, nine to five. …People who self-select and who are selected to lead institutions have a certain mindset orientation, or they wouldn't fit, they wouldn't be selected to lead those institutions, right? So, and then, you know, the administration has to work with the culture of the faculty. They could prod and nudge, but they can only move so far if people aren't receptive to whatever the particular innovation is. The president could say that's not a hill I'm going to die on. There are bigger issues that I can spend my time on. So

> certainly institutional culture has a bearing when you're asking what are the most significant differences. (Respondent 02)

> This is a culture that embraces some level of risk. In most higher ed, there is no reward for risk. In fact, there's a lot of consequences if you screw up because most people want you to be perfect before you start. I would suggest our move to a gamified, capstone entrepreneurship course…was such a huge leap that everything in between now has been quite easy since. We got lots of attention….But the real innovation happened after that which most people don't know….If you take a bold move, it will open doors for other things. If we took an incremental step, everything would have been an incremental slow step. (Respondent 03)

***Suggested planning questions***. Based on the findings related to the Innovation integrated concept, the following questions are suggested for consideration in planning for distributed education within Alberta's CCIs:

1. What innovative processes, methods, or offerings might be applied to distributed education practice that will deliver products and services of greater value to the institution's stakeholders (students, employers, government, etc.)?
2. How will such innovations be accounted for, protected from, and eventually made part of the institution's planning and operations processes?
3. What elements of the institution's culture and leadership might act as barriers or facilitators for the planned innovation?

This completes the description of Phase 6 of the framework analysis and as noted previously in this chapter, this was the last phase that was fully completed as part of this study.

The final two sections of this chapter complete the description of Phases 7 and 8 of Jabareen's (2009) conceptual framework analysis and suggest further work that might be undertaken toward validation and refinement of the conceptual framework developed within this study.

**Phase 7: Validating the conceptual framework**

As noted earlier, Phase 7 of Jabareen's (2009) methodology is intended to validate the conceptual framework to determine whether or not the:

> proposed framework and its concepts make sense not only to the researcher but also to other scholars and practitioners. Does the framework present a reasonable theory for scholars studying the phenomenon from different disciplines? Validating a theoretical framework is a process that starts with the researcher, who then seeks validation among "outsiders." Presenting an evolving theory at a conference, a seminar, or some other type of academic framework provides an excellent opportunity for researchers to discuss and receive feedback. (p. 54)

While beyond the scope of this study, completing this additional stage of investigation would assist in the development of a more robust and general theory of distributed education strategic planning while at the same time answering Brown's (1973) critique of grounded theory in which he warned that a balance needs to be struck in "research between verification and the exploration and formulation of theoretical ideas" (p. 13) to help ensure methodological rigour. The potential for such work is addressed briefly in Chapter 5.

**Phase 8: Rethinking the conceptual framework**

> Phase 8 of Jabareen's (2009) method is meant to remind researchers that
>
> A theory or a theoretical framework representing a multidisciplinary phenomenon will always be dynamic and may be revised according to new insights, comments, literature,

> and so on. As the framework is multidisciplinary, the theory should make sense for those disciplines and enlarge their theoretical perspective on the specific phenomenon in question. (p. 54)

As with Phase 7, this step is beyond the scope of the current study. Indeed, it really describes the ongoing development of the conceptual framework after its initial form is presented for comment, critique, and expansion by the community of scholars and practitioners. The conceptual framework presented here should be a useful tool for such future development by a wide audience, as the integrated concepts include several established areas of study across diverse disciplines such as leadership, governance, educational technology, etc.

**Summary of Findings and Conceptual Framework Overview**

Table 17 summarizes the findings for each of the integrated concepts discovered in the data and presented in this chapter for convenience and ease of comparison.

Table 17

*Summary of Study Findings*

| **Integrated Concepts** | **Summary of Findings** |
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| 1. **Provincial System** | • The Campus Alberta collaboration concept was generally viewed by respondents as being of mixed value, the lack of role clarity being a common criticism. However, those with wider provincial system responsibilities and perspectives affirmed the ongoing emphasis on a provincial approach to post-secondary planning.<br>• Despite the organization of the six-sector model and general provincial encouragement to collaborate, all Alberta PSIs are unique and independent organizations, and it is important to recognize the long history of the Alberta PSIs as autonomous institutions and how that reality contributes to the ethos of the provincial post-secondary system.<br>• The political traditions and norms of the provincial post-secondary system must be considered when planning for distributed education—especially when considering interaction or collaboration with other PSIs. |

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| | • While not currently the case, CCIs could conceivably be considered access points to the wider provincial system rather than fully independent institutions. This would be in keeping with the existing regional stewardship role included as part of the CCI mandate.<br>• An inherent tension exists between competition and collaboration within the Alberta post-secondary system, including the differential benefits to different types and sizes of institutions and the reality of institutional autonomy, individual self-interest, and self-preservation as factors in decision making at individual CCIs. According to many of the respondents, provincial direction to this point has been a sometimes confusing mixture of "hands-on" and "hands-off" management with conflicting incentives for competition and collaboration.<br>• Respondents almost universally viewed the now non-operational eCampusAlberta as a positive and constructive force in advancing distributed education in Alberta—especially amongst the CCI sector. It was seen as a concrete, organized manifestation of the Campus Alberta model promoted by the provincial government that improved the quality and sophistication of many institutions while promoting genuine collaboration across the provincial system.<br>• Athabasca University's role in the provision of distributed education within the Alberta system and the most appropriate relationship between AU and the CCIs was viewed as unsettled and potentially problematic. |
| 2. **Planning** | • Planning for distributed education across Alberta's CCIs has not been approached in a consistent fashion across the provincial system.<br>• Environmental complexity and rapid change tends to drive less formal, shorter planning cycles.<br>• Formal planning for innovative PSI activities like distributed education should be balanced with more rapid trial of new ideas to inform a dynamic cycle of planning, practice, and reflection.<br>• Innovative activities and initiatives must eventually become part of regular institutional operations if they are to scale and continue sustainably.<br>• Broad engagement with stakeholder groups, especially including executive team, faculty, front-line support staff, and students, is necessary to obtain sufficient understanding of perspectives and support for change.<br>• Effective planning for complex activities often requires substantial time and attention, making it difficult to pursue without dedicated resources. |

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| 3. **Leadership** | • A clearly articulated expression of vision for distributed education from senior institutional champions is important in setting direction for planning—combined with a willingness to formalize and document the institution's commitment. The vice-president academic is commonly viewed as the leader most essential to success in planning and implementing distributed education initiatives.<br>• Personal leadership characteristics and styles of those in senior institutional leadership positions play a role in determining the success of innovative initiatives like distributed education.<br>• Leadership for distributed education and related inter-institutional collaborative efforts at the provincial system level, mainly meaning the ministry responsible for advanced education, was viewed as inconsistent and unclear. There is support for greater leadership from the province in moving forward a correlated distributed education agenda but some wariness of too much government intervention beyond the level of overall vision.<br>• Unstable leadership due to recent waves of retirement at senior institutional levels and a period of rapid turnover within the ministry has negatively impacted attempts at progress in expanding distributed education across the provincial system and specifically within the CCIs. |
| 4. **Technology** | • Provincial investment in technology infrastructure and bandwidth access is viewed as inadequate to enable the full potential of distributed education across the provincial system—especially for those CCIs operating in rural Alberta.<br>• Many CCI institutional plans are focused on more efficient technological solutions through either shared institutional resources or cloud computing alternatives to traditional on-site technology resources—both of which require adequate network bandwidth to be practical.<br>• Rapidity of technological change, related social and political change, and the challenge of sufficiently rapid institutional adaptation—including process, infrastructure, and culture—is a challenge for planning of distributed education programs. Not every new technology or innovation ultimately succeeds and finds a lasting place within educational practice, making the "new normal" hard to grasp.<br>• Student expectations, often based on the rapid adoption of consumer technology and its ubiquitous presence in students' lives, have resulted in demand for highly flexible, distributed services in education even amongst those engaged in more traditional on-campus programs. |

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| | • Networked learning technologies have the potential to be "deinstitutionalizing," meaning that they may lessen requirement for the infrastructure and systems usually associated with a PSI. |
| 5. **Rationale for DE** | • Respondents generally accepted distributed education as the "new normal," to the point that its importance and continued place in the CCIs and the provincial system was taken as a given—perhaps to the point of no longer being critically examined.<br>• Rationale for pursuing distributed education was most commonly viewed as stemming from student demand as the primary driver but respondents made little mention of exactly how evidence for the perceived drivers for distributed education was gathered or evaluated.<br>• Opportunity cost, meaning that by choosing to not offer distributed education options, an institution could be missing a chance to serve its learners as well as grow in scope and influence, was another reason mentioned for pursuing distributed education.<br>• Respondents generally did NOT see reduced need for physical campus space as a rationale for distributed education. Most tended to see the future of post-secondary education as a blend of delivery modes, with continued strong demand for elements of an on-campus learning experience. |
| 6. **Internal Environment Issues** | • Respondents noted that many institutional similarities exist within the CCI sector—especially the emphasis on student access and regional stewardship. However, many also described institutional differences related to historical roots, culture, risk tolerance, financial situations, regional demographics, access to technology, rural vs. urban location, relative size, etc. and how these differences impacted the value and viability of distributed education as a delivery choice.<br>• Other respondents focused on the programming characteristics that differentiate the CCIs, noting that some are more comprehensive while others focus on niche programming aimed at specific stakeholders.<br>• Respondents highlighted the need for the adoption of policies and decision-making mechanisms that standardize institutional practices to support the smooth functioning of distributed education functions and noted that this need for internal policy on distributed education also had to align with other provincial institutions to maximize collaboration and student opportunities.<br>• Distributed education and the expectations it engenders in students tend to increase the requirement for "institutional collaboration" or |

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| | "internal interdependence," meaning greater emphasis on coordination of internal functions to meet student needs. |
| 7. **External Environment Issues** | • Respondents almost universally noted the rapid rate of change in their operating environment and the challenge this presents when engaging in any planning process.<br>• Demographic issues were among the most frequently mentioned as part of the External Environment integrated concept in planning for distributed education, especially the impact of Alberta's increasingly diverse population.<br>• Respondents highlighted the challenges that arise for smaller rural institutions dealing with increasing—but somewhat selective—urbanization of Alberta's population that leaves specific ethnic and cultural communities potentially underserved by post-secondary opportunities.<br>• Concerns exist regarding sustainability for specific programs and for some of the CCIs themselves—and the potential for eventual consolidation or rationalization of the provincial system is viewed as a potential outcome by some. Beyond funding and registration numbers, the challenge of adequately staffing CCIs in rural locations was highlighted as requirements for sophisticated staff skills (such as information technology) become more essential to such institutions.<br>• Respondents noted the importance of evolving student expectations in planning for distributed education due to the changing nature of a society where information and services are increasingly available online from a distance but did not believe this will necessarily translate to decreased demand for more traditional face-to-face learning. The "on-campus" experience is viewed as likely to have continued value because the future of post-secondary education is seen as evolving toward a blended delivery model focused on choice and access. |
| 8. **Governance** | • Most respondents characterized Alberta's post-secondary system as somewhat decentralized and locally governed but offered several perspectives on what governance structures might best serve the system and especially the CCI sector. Some wondered whether institutional autonomy was still the right structure for the sector, while others spoke about the challenge and potential political motivations inherent in government-appointed PSI boards of governors. Other respondents commented on the challenge presented when an institution shifts toward increased distributed education modes due to disruption of traditional roles, power structures, and organizational units—and the need for incentive structures to shift as well. Another respondent offered a generalized |

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| | summary of the importance of accurate and shared understanding of roles as an important factor in good governance.<br>• Several respondents discussed the challenge of maintaining good governance while also enabling institutional innovation.<br>• Respondents provided many perspectives on the role and potential failure of governance during the eCampusAlberta experience but tended toward a sense that the consortium lacked sufficiently strong leadership and controls to move it beyond the self-interest of individual member institutions. Many indicated that stronger ministry direction and control would have been helpful in order to achieve a more rationalized provincial system for distributed education.<br>• Most respondents expressed a need for stronger and clearer provincial direction and support for distributed education though there were a few notable exceptions who believed government should play a less prominent role in directing the post-secondary system.<br>• One respondent offered a metaphor of how we might organize and govern distributed education across Alberta's post-secondary system. He proposed that often, we seek to build systems by combining existing entities—much like breaking eggs to make an omelet. However, this approach may create significant operational and governance issues. Instead, the respondent advocated better understanding of the unique properties of each entity and building a system that defines, respects, and encourages collaboration across their boundaries so they can function together—analogous to an egg carton. |
| 9. **Academic and Delivery Considerations** | • Respondents tended to focus more on issues related to enabling effective pedagogy—innovative and sustainable business models, flexible delivery and instruction models to promote access, quality assurance, and organization of appropriate student supports and institutional functions to serve distributed learners—rather than pedagogy itself. Most had already accepted the viability and even potential superiority of these delivery modes over traditional face-to-face programming.<br>• An issue of particular concern to respondents was student access to post-secondary learning and the potential for distributed education to increase access through greater flexibility of program delivery. This was balanced by a concern for creation of potential redundancy within the system and a need to rationalize how distributed education is organized for greater system efficiency.<br>• Another commonly expressed thought on academic issues was the importance of quality assurance in distributed education and the important role that eCampusAlberta played in advancing that understanding across the Alberta post-secondary system. |

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| | • One respondent commented on the need to pay attention to pedagogical differences in disciplines, arguing that not all subjects—in this case second language learning—are as amenable to distributed delivery.<br>• Respondents commented on the tendency for distributed education to drive a greater need for coordination of various academic and non-academic support services for students, some of whom might never be on campus, and the logistical and financial challenges the provision of such services might entail.<br>• Faculty support and training to effectively engage in online teaching was a common theme, several respondents indicating that this usually requires increasingly focused and coordinated approaches to ongoing faculty development.<br>• One respondent commented on the need to be aware of faculty collective agreement terms and conditions to be sure that any planned delivery models would not create workload or compensation issues. |
| 10. **Costs and Funding** | • All respondents commented on the central importance of financial considerations associated with planning for distributed education. These concerns frequently took the form of how existing provincial funding might be most effectively distributed and managed within the provincial system to produce sustainable results at the necessary scale of operations to serve stakeholder needs.<br>• Another commonly expressed concern was the challenge of balancing local access against the potential for increased efficiency through distributed education, raising the possibility that the overlapping mandates of the CCIs could be inherently inefficient given Alberta's current demographic trends.<br>• Respondents highlighted the inherent conflict between planning for efficient system-wide access through individual and provincial investment in distributed education and the reality of institutional independence, competition, self-interest, and survival.<br>• Many respondents reflected on the original goal of the eCampusAlberta consortium to increase collaboration and efficiency (and potentially revenue) in distributed education and the sustainability challenges that lead to its decline. Of particular note was the general consensus that system-wide solutions would require greater provincial support and direction in order to realize their efficiency potential. |

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| 11. **Innovation** | • Innovation was directly mentioned by only a few respondents but emerged from the data as a distinct idea of sufficient value to merit consideration in a distributed education planning process.<br>• In discussing innovation, respondents tended to be most concerned with the challenges inherent in introducing novel ideas and practices within the long-established, complex systems found in PSIs and the provincial post-secondary system. Frequently, respondents viewed this as an organic and iterative process that may be difficult to implement strategically.<br>• A few respondents emphasized the importance of intentional support for innovative practices, especially willingness to financially support necessary development of faculty and other staff to deliver innovative distributed education.<br>• Respondents commented on the need for a leadership mindset and institutional culture that genuinely supports innovative practice as part of enabling distributed education. |

Largely based on Jabareen's (2009, p. 58) example, the researcher has developed a model of the proposed conceptual framework (Figure 3), to illustrate the relationship of the integrated concepts as discovered from the data. This conceptual framework places Planning as the central integrated concept, as this activity is the focus of the study. The other integrated concepts are shown linked to the central activity, as each must be considered during the planning process. However, these integrated concepts are also shown as linked to each other to indicate the highly integrated and interdependent nature of the planning context.

*Figure 3*. Overview of conceptual framework for planning of distributed education in Alberta's CCIs.


A combined overview of the conceptual framework and suggested questions for planning is presented as a *Guide to Planning for Distributed education in Alberta's CCIs* in Appendix E.

**Summary**

Using the phases of Jabareen's (2009) method for building a conceptual framework as an outline, this chapter presented the process of developing 11 integrated concepts through grounded theory methods of data analysis of the documents and interview transcripts described previously. These 11 integrated concepts and related sub-concepts were presented and supported with evidence drawn from the data, along with suggested questions for planning that

emerged from the analysis. Finally, the integrated concepts were arranged within a conceptual framework for planning of distributed education within Alberta's CCIs (see Figure 3).

The following chapter will conclude this report with a discussion of the findings, their implications and relationship to the original research questions, and recommendations for further inquiry.

# Chapter 5

## Conclusions and Recommendations

> "The structure or framework of our system for schooling was designed by people to serve people. It can and should be changed whenever it ceases to meet their needs effectively."
>
> - Worth (1972, p. 64)

This chapter presents a discussion of the study's findings and conclusions in relation to the original research questions as well as to new questions that were discovered from the data during the course of the study. The findings are further discussed in relation to the proposed conceptual framework presented in Chapter 4, and suggestions are offered for how the framework might inform planning for distributed education within Alberta's CCIs. Next, in keeping with Worth's (1972, p. 64) chapter-opening quote regarding the need for educational systems to change to meet the needs of a population, it makes recommendations for further research on the topic and application of the study's findings to institutional and system-wide planning to meet the needs of a changing provincial population. Finally, the chapter and the report conclude by summarizing the study and its implications, including reflections on meeting the challenge of rigour in qualitative research.

### Conclusions: Answering the Original and Discovered Questions

The aim of this project was to develop a conceptual framework for planning of distributed education appropriate for use within Alberta's CCIs, and thus the researcher began this study with a limited set of research questions intended to focus the study toward that end. While these initial questions were only partially answered, the discussions they initiated as part of semi-structured interviews generated copious related and relevant data, which were coded,

analyzed, and presented as 11 integrated concepts in Chapter 4. These integrated concepts constitute the conceptual framework, the development of which was the ultimate goal of the study.

This section of the dissertation presents the original research questions along with discussion of related findings. Perhaps more importantly, it presents the unanticipated questions that have been derived from the interview data and reflections on how these questions and their answers shaped the development of the conceptual framework.

**The original research questions**. The original research questions were developed based on the researcher's interest in better understanding the methods and considerations currently in place within Alberta CCIs for planning for distributed education. An important finding of the study has been that limited specific or systematic methods or frameworks have been applied for such planning, but there is sufficient agreement on the issues of importance for consideration in such planning for such a framework to be developed and implemented. Table 18 lists the original research questions along with a summary of related findings from the data and implications of those findings (where applicable).

Table 18

*Original Research Questions and Findings*

| **Original Questions** | **Findings and Implications** |
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| What are generally accepted practices for planning, and how well do they fit the context of planning for distributed education delivery within an Alberta CCI? | Limited evidence for formal or systematic planning of distributed education was found in the collected data. This does not necessarily mean that individual institutions are not engaged in meaningful planning but more likely that such activities are carried out as a part of larger, institution-wide planning processes or more informal or ongoing planning processes. |
| What planning methods and frameworks already exist within the field of distance or distributed | The first part of this question is explored in detail as part of the literature review found in Chapter 2. In summary, while substantial work has been published |

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| education (or other related areas of practice), and to what degree do they inform or assist the planning process undertaken in the Alberta CCI context? | exploring planning for distributed education, little evidence was found to show that such processes have been applied within Alberta's CCIs. |
| What do senior leaders within Alberta CCIs and the larger Alberta post-secondary system consider the key issues and considerations in developing a plan for distributed education delivery? | This research question proved to be the most valuable of those originally proposed by the researcher. Exploring this theme through the semi-structured interviews resulted in the majority of the data from which the findings and conceptual framework detailed in Chapter 4 were induced.<br><br>Within the limits of this study, the answer to this question is summarized as the following 11 integrated concepts:<br><br>• Provincial System<br>• Planning<br>• Leadership<br>• Technology<br>• Rationale for DE<br>• Internal Environment Issues<br>• External Environment Issues<br>• Governance<br>• Academic and Delivery Considerations<br>• Costs and Funding<br>• Innovation |
| What cultural and procedural shifts are required to enable effective distributed education practices within Alberta CCIs, and how do these issues affect the planning process? | As mentioned in Chapter 1, this question had its origin in the researcher's involvement in an earlier study that explored the challenges institutions face in ensuring that student supports and internal processes change to meet emerging demands of distributed education programs ((Shimoni et al., 2010).<br><br>While limited data related to this question was collected, three notable findings did emerge, evidenced by the following abbreviated statements from the findings presented in Chapter 4:<br><br>The need for pathways from innovation to scaled practice<br>• Innovative activities and initiatives must eventually become part of regular institutional operations if they are to scale and continue sustainably. |

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| | • Respondents highlighted the need for adoption of policies and decision-making mechanisms that standardize institutional practices to support the smooth functioning of distributed education functions and noted that this need for internal policy on distributed education also needed to align with other provincial institutions to maximize collaboration and student opportunities.<br><br>The need to meet student expectations driven by technological change<br>• Student expectations, often based on the rapid adoption of consumer technology and its ubiquitous presence in students' lives, have resulted in demand for highly flexible, distributed services in education even amongst those engaged in more traditional on-campus programs.<br><br>The need to increase coordination of internal processes and supports to meet the requirements of students not present on campus<br>• Distributed education and the expectations it engenders in students tend to increase requirement for "institutional collaboration" or "internal interdependence," meaning greater emphasis on coordination of internal functions to meet student needs.<br>• Respondents focused on issues related to enabling effective pedagogy—innovative and sustainable business models, flexible delivery and instruction models to promote access, quality assurance, and organization of appropriate student supports and institutional functions to serve distributed learners—rather than pedagogy itself. |

**The discovered research questions**. Though less evidence of existing systematic planning for distributed education was available than the researcher had originally anticipated, the data collection and analysis process revealed answers to numerous additional questions that might have been asked from the outset of the study. These "discovered" research questions, which the researcher has derived from the findings, are presented in Table 19 along with a

summary of related findings from the data and implications of those findings (where applicable) and represent the researcher's interpretation of the questions answered by the study beyond those originally described in Chapter 1. They are related to the suggested planning questions outlined in Chapter 4 as part of the conceptual framework development but presented here as a summary of questions and ideas explored and findings obtained during the study.

Table 19

*Discovered Questions and Supporting Findings*

| **Discovered Questions** | **Findings and Implications** |
|---|---|
| **Provincial System** | |
| 1. What role should the institution play in Campus Alberta to best enable this concept and add value to the provincial post-secondary system? | • Findings suggest that while the Campus Alberta concept may not yet be fully defined, it remains a ministry priority and institutions would benefit from articulating how they add value to the provincial system through their distributed education programs. |
| 2. What are the unique historical, cultural, disciplinary, or other features of the institution? | • Despite being part of a single sector within the province's six-sector model of post-secondary education, each of the CCIs comes from distinct historical roots and tradition that predate the system. Understanding how these historical and cultural elements situate the CCI within its community is important to planning the most valuable distributed education offerings and supports. |
| 3. How does the closure of eCampusAlberta affect the institution, and should other forms of collaboration for distributed education be explored? | • For approximately 15 years, eCampusAlberta has provided a central organizing role for much of the distributed education efforts within Alberta's CCIs. In its absence, institutions will need to determine what student supports, registration systems, marketing, and quality assurance functions (amongst others) will need to be accounted for individual institution plans. |

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| 4. What is the relationship between the institution's programming and distributed education offerings and those found at Athabasca University? | • Findings indicated that Athabasca University's role in the provision of distributed education within the Alberta system and the most appropriate relationship between AU and the CCIs was viewed as unsettled and potentially problematic due to its roots as Alberta's provider of distributed post-secondary education. CCIs may benefit from a better-defined relationship with Athabasca University now that distributed education has become part of mainstream post-secondary activity. |
| **Planning** | |
| 1. Are plans for distributed learning coordinated, congruent, or in conflict with those of other CCIs? | • While each CCI is an independent, board-governed institution, findings indicate that awareness of and coordination with other institutional plans is an important element of planning for distributed education given that it often extends beyond the geographic boundaries of the CCI regions. |
| 2. Is the planning cycle appropriate for the often-rapid development within distributed education practice? | • Rapid change in technology, student expectations, labour markets, and society tend to drive shorter planning cycles for distributed education. |
| 3. Does planning account for eventual scaling and "mainstreaming" of innovative pilots or other small-scale distributed education initiatives? | • Innovative activities and initiatives must eventually become part of regular institutional operations if they are to scale and continue sustainably. |
| 4. Are sufficient resources, such as time and expertise, devoted to the distributed education planning process? | • Institutional planning is complex and often time-consuming, especially when plans represent a significant shift from current practice. |
| **Leadership** | |
| 1. Is planning for distributed education supported and championed at the executive level of the institution? | • Findings indicated that while broad stakeholder engagement was important, effective senior-level support within the institution is an essential aspect of planning and implementing distributed education. |

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| 2. Are leaders in place throughout the institution (executive, deans, program chairs, etc.) with the right leadership and personal characteristics to implement distributed education plans? | • Findings indicated that individual leaders throughout an institution had a strong impact on the success of distributed education planning and implementation. In addition, unstable leadership due to rapid turnover was noted as a barrier to the introduction and sustainment of such innovative plans. |
| 3. Is further clarification or leadership required from the provincial ministry level in order to develop effective distributed education plans for the institution? How will this be obtained? | • Respondents had mixed views, but many indicated that greater clarity from the ministry on how the province wishes to govern distributed education efforts would be helpful in planning. |
| **Technology** | |
| 1. Does the institution have access to the required technology, bandwidth, and expertise required to implement planned distributed education programming? | • Respondents from more rural institutions noted that challenges still exist in securing sufficient bandwidth, infrastructure funding, and stable expert staffing to operate sustainable, independent distributed education programs. |
| 2. Does the institution have access to sufficient resources and expertise to scale pilot plans sustainably when faced with competition from other education providers? | • Respondents noted that rapidity of technological change, related social and political change, and the challenge of sufficiently rapid institutional adaptation—including process, infrastructure, and culture—is a challenge for planning of distributed education programs. For many institutions—especially smaller CCIs with fewer resources—this will make staying current and scaling distributed learning programs more challenging. |
| 3. Do opportunities exist for technological collaboration or shared resources with other Alberta post-secondary institutions? | • Many respondents noted that high-speed networks and cloud computing solutions make possible inter-institutional shared services that would not have been possible just a few years ago. |
| **Rationale for DE** | |
| 1. Why does the institution wish to engage in distributed education? | • Respondents tended to view distributed education as “the new normal” and indicated that some mix of perceived student demand or competitive forces |

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| | were the main drivers for pursuing distributed education as part of CCI programming. However, few offered specific evidence for these beliefs. |
| 2. What specific benefits of efficiencies does the institution expect to realize by pursuing distributed education? | • Respondents almost universally cited increased access, program flexibility, and student choice as drivers for distributed education.<br>• Respondents generally did NOT see reduced need for physical campus space as a rationale for distributed education nor did they cite expectations of greater efficiencies. |
| **Internal Environment Issues** | |
| 1. What is the level of institutional "readiness" to offer distributed education programs? | • Even though the CCIs share a sector classification and mandate, they are also unique institutions with characteristics that impact the value and viability of distributed education as a delivery choice. |
| 2. Which of the institution's programs are best suited to distributed delivery? | • Respondents indicated programming characteristics differentiate the CCIs, noting that some are more comprehensive and others focus on niche programming aimed at specific stakeholders. |
| 3. Will any of the institution's existing practices, processes, or policies require change in order to accommodate distributed education and support of students distant from the campus? | • Respondents highlighted the need for adoption of policies and decision-making mechanisms that standardize institutional practices to support the smooth functioning of distributed education functions and noted that this need for internal policy on distributed education also needed to align with other provincial institutions to maximize collaboration and student opportunities. |
| 4. Will any of the institutions organizational structures or departmental relationships require realignment to meet the needs of distributed students? | • Distributed education and the expectations it engenders in students tend to increase the requirement for "institutional collaboration" or "internal interdependence," meaning greater emphasis on coordination of internal functions to meet student needs. |

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| **External Environment Issues** | |
| 1. What changes are anticipated in the institution's operating environment in the near future: technological, social, economic, demographics, etc.? | • Respondents almost universally noted the rapid rate of change in their operating environment and the challenge this presents when engaging in any planning process, often citing issues such as technology, demographics, diversity, and local and provincial economics. |
| 2. What impact does the institution's location—especially rural vs. urban—have on demand for and viability of distributed education? | • Respondents highlighted the challenges that arise for smaller rural institutions dealing with increasing—but somewhat selective—urbanization of Alberta's population that leaves specific ethnic and cultural communities potentially underserved by post-secondary opportunities. |
| 3. Will the institution be able to attract and retain the personnel required to successfully and sustainably operate distributed education programs? | • A few respondents noted the challenge of adequately staffing CCIs in rural locations as requirements for sophisticated staff skills (such as information technology) become more essential to such institutions—especially when engaged in distributed learning. |
| 4. What will the impact of increasing distributed education programming be for the rest of the institution, e.g. demand for physical space and in-person services? | • Respondents generally did not believe distributed education would lead to decreased demand on the institution's physical facilities. |
| **Governance** | |
| 1. Does the institution have the sufficient and genuine support of the ministry in pursuing distributed learning? | • Many respondents characterized Alberta's post-secondary system as somewhat decentralized and locally governed and noted the inherent tension involved in the autonomy of a board-governed institution acting according to self-interest while at the same time remaining accountable to the provincial system and ministry. |
| 2. Do the current governance and oversight structures of the institution allow sufficient flexibility for innovation practices that may be introduced as part of distributed education delivery? | • Several respondents discussed the challenge of maintaining good governance while also enabling institutional innovation. |

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| 3. Are partnerships being considered as part of a distributed education plan? How will these be governed to allow for flexibility, oversight, and conflict resolution? | • Respondents emphasized the importance of accurate and shared understanding of roles as an important factor in good governance when many groups are involved. |
| **Academic and Delivery Considerations** | |
| 1. What standards and processes will be implemented to ensure the quality of programs offered through distributed education? | • Respondents frequently expressed the need for defined standards and processes to ensure maintenance of quality in distributed education programs. |
| 2. How will faculty be equipped with the necessary skills for teaching in a distributed environment? | • Faculty support and training to effectively engage in online teaching was a common theme, several respondents indicating that this usually requires increasingly focused and coordinated approaches to ongoing faculty development. |
| 3. Are there any collective bargaining issues that may arise due to a shift toward increased distributed education? | • Existing faculty collective agreement terms and conditions should be examined to be sure that any planned delivery models would not create workload or compensation issues. |
| **Costs and Funding** | |
| 1. Does a viable business model exist for the intended distributed education program? | • All respondents commented on the central importance of financial considerations and viable business models associated with planning for distributed education in an era of reduced provincial funding. |
| 2. Will the intended distributed education program create a redundancy, either with the institution's own face-to-face programming or with existing distributed education offered by other institutions? | • Concern was often expressed for the potential creation of redundancy within the provincial system and a perceived need to rationalize how distributed education is organized for greater system efficiency. |
| 3. Do partnerships or system-wide provincial approaches have a potential role in the institution's distributed education plans? | • Respondents highlighted the inherent conflict between planning for efficient system-wide access through individual and provincial investment in distributed education and the reality of institutional independence, self-interest, and survival.<br>• These concerns frequently took the form of how existing provincial funding might |

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| | be most effectively distributed and managed within the provincial system to produce sustainable results at the necessary scale of operations to serve stakeholder needs. |
| **Innovation** | |
| 1. How will the institution's senior leadership support the innovative practices often inherent in distributed education until they become accepted and self-sustaining? | • Respondents were concerned with the challenges inherent in introducing novel ideas and practices within the long-established, complex systems found in PSIs and the provincial post-secondary system and emphasized the importance of intentional support for innovative practice.<br>• Respondents commented on the need for a leadership mindset and institutional culture that genuinely supports innovative practice as part of enabling distributed education. |

**Recommendations for Further Research and Implementation**

The genesis of this study was the researcher's desire to better understand the factors relevant to the planning of distributed education in Alberta's CCIs and to express these factors in a conceptual framework grounded in data gathered within that specific context. This conceptual framework, detailed in Chapter 4 and included as part of the *Guide to Planning for Distributed Education in Alberta's CCIs* in Appendix E, constitutes a substantive theory that may have the potential for expansion into a more general grounded theory. Such expansion would require additional data collection and analysis in other contexts and jurisdictions.

A first step in building the conceptual framework into a more robust grounded theory for the planning of distributed education would be replication of the study across other institution types and jurisdictions to capture issues and potentially additional integrated concepts not discovered within the current study data. In addition, potential gaps exist within the study's data where further, more focused inquiry within the Alberta context might assist in both broadening

and strengthening the initial conceptual framework—as well as opening other avenues for discussion and understanding of the current and desired future state of the Alberta post-secondary system and especially the role of the CCIs within it. Recommended questions for further inquiry, aligned with each of the integrated concepts from the initial conceptual framework, are summarized in Table 20.

Table 20

*Questions for Further Inquiry within the Initial Conceptual Framework*

| **Integrated Concepts** | **Questions for Further Inquiry** |
|---|---|
| 1. **Provincial System** | • What is the future of the Campus Alberta-like collaboration concept given the recent loss of eCampusAlberta? How will this impact (if at all) planning for distributed education at Alberta CCIs?<br>• Should a new distributed education consortium, coalition, or partnership be explored within Alberta's post-secondary system? If so, how would it differ from—and avoid the fate of—eCampusAlberta, and what would be the most effective governance and ministerial oversight structure for such an organization? Which types of institutions should be included in such an organization?<br>• Should the CCIs continue to operate as independent providers of distributed education, or should they be viewed as access points to distributed education within a larger system?<br>• What is the most effective role for Athabasca University within the provincial distributed learning system? What is the most effective relationship between Athabasca University and the CCIs in the distributed delivery of college-level or university transfer programming—if any? |
| 2. **Planning** | • Which, if any, of the planning methods discussed in the literature review (see Chapter 2) might most effectively be used in conjunction with the initial conceptual framework? (See below or further discussion.)<br>• What are the advantages and disadvantages of a unified planning system for distributed education across the Alberta post-secondary system—and especially across the 11 CCIs? |
| 3. **Leadership** | • Should leadership and direction for distributed education in Alberta CCIs be mostly a ministerial responsibility, mostly an institutional responsibility, or a shared responsibility? If shared, what elements of leadership and direction do the ministry and CCIs need from each |

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| | other for Alberta's post-secondary system to effectively and efficiently deliver distributed education? |
| 4. **Technology** | • Would centralized, province-wide technology services be effective in alleviating some of the challenges experienced by CCIs—especially smaller institutions in rural locations—in keeping up with technology infrastructure and staffing demands? If so, would this best be served by voluntary collaboration, or through centrally planned and magisterially governed systems? |
| 5. **Rationale for DE** | • Is there sufficient rationale for all Alberta CCIs to be involved in distributed education—or does this lead to over-saturation and artificial competition amongst institutions?<br>• Exactly what stakeholder (student, institution, ministry, economy, etc.) benefits are obtained through the provision of distributed education, and could these be more easily realized through a rationalized approach to distributed education within Alberta's CCIs? |
| 6. **Internal Environment Issues** | • What differences exist between the individual CCIs that make them more or less suited to delivery of distributed education?<br>• What challenges would exist in standardizing policies and practices related to distributed education across the CCIs? Would the return in student access and outcomes and system efficiency justify the cost, effort, and any potential negative outcomes involved in such a process? |
| 7. **External Environment Issues** | • How will demographic shifts affect plans for CCI growth generally and distributed education programming specifically?<br>• Will distributed education offerings from smaller and more rural CCIs outside the Edmonton-Red Deer-Calgary population corridor be economically viable or desirable in the next five to ten years? |
| 8. **Governance** | • Do current systems of governance—both at the institutional and provincial-system level—effectively support the planning and implementation of distributed education at Alberta CCIs? Would the system be better served by more centralized, less centralized, or altogether different organization and oversight?<br>• To what degree would a different system of governance threaten institutional autonomy? Is there a system that might be devised that would allow greater collaboration while maintaining appropriate autonomy (egg carton) versus a system that removes autonomy and homogenizes the CCI system (omelette). See Chapter 4 for further discussion of this analogy. |
| 9. **Academic and Delivery Considerations** | • What models of distributed education delivery are currently in use at Alberta CCIs? Are any demonstrably superior to others, and should |

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| | efforts be made to replicate best practices across the provincial system?<br>• Have practices and technologies for teaching and learning at a distance reached a state of accepted practice, or are further developments required to enable effective distributed education?<br>• What evidence exists that distributed education at Alberta CCIs has improved student access and program flexibility? Could that same access and flexibility be achieved more economically (with less redundancy) through different organization of the CCI system—or perhaps the entire post-secondary system?<br>• What standards exist for evaluation and maintenance of quality in distributed education programs at Alberta CCIs—especially in the absence of eCampusAlberta?<br>• What potential challenges still exist in fully integrating distributed education within Alberta CCIs (e.g., faculty collective agreements/workloads)? |
| 10. **Costs and Funding** | • Does the funding model currently used in Alberta's post-secondary system adequately address the needs of distributed education within the CCIs?<br>• How could redistribution of available funding be used as a means of creating a more efficient and effective distributed education system in Alberta? |
| 11. **Innovation** | • How might the Alberta post-secondary system best balance incentives for innovative educational practice while at the same time controlling costs?<br>• What changes to provincial and institutional culture might be required to effectively support innovative educational practice? |

As mentioned in Chapter 2, related work designed to articulate issues in planning for distance education has been completed by Pisel (2008) and Minnaar (2013), and a complete comparison of their results with those of the current study and additional inquiry as discussed above may also be an important step toward a unified conceptual framework and more complete grounded theory for such planning. Alternatively, since the data collected during the study touched on topics anticipating practice changes within the Alberta post-secondary system, they might also be reanalyzed for insights toward related questions, especially as part of further inquiry on the future of higher education generally.

Finally, a crucial next step in understanding the usefulness of the conceptual framework developed during this study will be to actually implement it alongside a specific planning methodology and process within one or more Alberta CCIs. Such an implementation process could be treated as a form of "action research," which includes a range of methodologies designed to assist practitioners to collaboratively solve problems of practice within their working environment, while at the same time engaging in cycles of reflection and analysis to determine and improve the effectiveness of the entire process (Cohen, Manion, & Morrison, 2007). The goal of such a process would be not only to produce a plan for distributed education at a CCI and evaluate the effectiveness of the proposed conceptual framework in that process but also to better understand which planning methods (e.g. SWOT Analysis, SOAR/Appreciative Inquiry, Scenario Planning; see Chapter 2) might be most productively used in conjunction with the conceptual framework.

**Conclusion**

The qualitative study described in this dissertation used grounded theory methods to develop a conceptual framework to guide the planning of distributed education delivery within Alberta's Comprehensive Community Institutions (CCIs). After presenting the context, background literature, and methodology to be employed, this dissertation detailed how data were gathered from relevant documents and especially from a series of 12 semi-structured interviews with senior leaders within Alberta's post-secondary system who possessed direct knowledge of and experience with the planning and implementation of distributed education programs across the provincial system and especially within the CCIs. The dissertation further described how the data were analyzed using grounded theory methods, specifically using the

conceptual framework analysis method outlined by Jabareen (2009) to produce a conceptual framework for the planning of distributed education in Alberta's CCIs.

Care was taken to describe the criteria and challenges for rigour in qualitative research (see Chapter 3) and to employ methods capable of demonstrating such rigour. In addition to selecting a grounded theory method specifically designed to develop a conceptual framework (Jabareen, 2009), the study made use of a variety of data sources from relevant literature, documentary records, and interviews with purposively selected respondents in order to meet the need for adequacy of data (Morrow, 2005). Further, extensive evidence in the form of respondent and document quotations, along with records of the researcher's coding practices was presented to assure the reader of the study's findings, thus fulfilling the need for auditability (Beck, 1993) and providing "concept-indicator" links (Seal, 2003, p. 393). This evidence was woven together and presented with the researcher's reasoning and observations in keeping with Creswell's (2003) emphasis on detailed description. Where discrepancies in the data occurred, for example in the case in Respondent 12's view of appropriate government roles in distributed education systems, these inconsistencies were explicitly presented as part of the description (Creswell, 2003; Morrow. 2005). As Beck (1993) notes, the credibility of the study, which Morrow (2005) compares to its internal validity, is ultimately "evident when others, such as researchers or practitioners, can recognise the experience when they encounter it, having only read about it in a study" (p. 19). The researcher believes that the description of the study, its theoretical foundation and methods, the researcher's background, the participants' contributions, and the reasoning presented in the data analysis and development of the conceptual framework ultimately form a solid foundation for readers to accept the credibility of the study and findings.

As described above, the findings supporting the development of the conceptual framework were presented along with extensive substantiating examples from the data. Also presented was a discussion of how the results of the study answered the original research questions and, perhaps more importantly, how many new questions for consideration in planning and further research of distributed education were revealed from the data analysis. A summary of the conceptual framework and additional questions relevant to planning of distributed education is presented as a *Guide to Planning for Distributed Education in Alberta's CCIs* (see Appendix E).

The study's findings suggest that Alberta's CCIs find themselves in a dynamic and challenging political, social, economic, demographic, and technological environment that highlights the need for ongoing planning activity but also renders it more difficult to engage in traditional planning processes as the pace of change increases. These institutions have responded positively to pressures to innovate and have found new ways to deliver programming for greater student access and flexibility but face ongoing difficulty in coordinating all the resulting activity and in evolving new policy and governance structures to ensure smooth, efficient, and well-integrated operations. These issues may be addressed through effective planning processes.

Issues of increasing costs and reduced funding were important to most study respondents, and this was often discussed in relation to the inherent tension between competition and collaboration within Alberta's post-secondary system given the provincial ministry's continuing emphasis on the "Campus Alberta" model. Distributed education efforts were seen as sometimes highlighting this tension, as they often cross geographic boundaries and create challenges in planning for both institutional success and overall system efficiency. These issues

tended to emphasize the need for a well-considered rationale for pursuing distributed education delivery. It was generally agreed that more clear leadership and direction was required to coordinate distributed education activity in the province, especially given the recent cessation of eCA.

Finally, the data revealed greater emphasis on organizational issues related to enabling or ensuring effective teaching in distributed education (e.g,. appropriate policies, quality assurance) rather than on actual best practices in teaching at a distance. It is possible that this area has reached an accepted (or at least acceptable) state of practice and is no longer an issue of major concern to those charged with planning distributed education.

Despite the challenges inherent in trying to plan in a rapidly changing environment, the data revealed that leaders still value the planning process but recognize the need for shorter planning cycles and flexible contingency options, perhaps best expressed in the following interview response previously quoted in Chapter 4:

> So, I think maybe, long-term planning has to be, kind of value-driven, but it's really the meat. I think maybe we just have to have shorter windows of fixed activity and an awareness that that's the case….And so maybe rather than thinking about planning in 20 or 30 years, know that you at best can see the next 10 years. And just have that acute sense of awareness that everything that you're putting in place has got to have the flexibility to accommodate something you can't even see or imagine. (Respondent 01)

The core sentiment of "plans are worthless, but planning is everything" from the earlier quoted Eisenhower (1957) speech seems to hold true for the planning of distributed education in Alberta's CCIs: The specific plans themselves may not prove perfectly accurate and may require so much adaptation that they amount to ongoing activity, but the planning process itself remains

vital to organizational adaptation and coordination in a time of significant change. The researcher offers the findings of this study and the resulting conceptual framework for the planning of distributed education as a potential guide for Alberta's CCIs in meeting this challenge and as a basis for further discussion and inquiry.

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## Appendix A

Planning for Distributed Education within Alberta's
Comprehensive Community Institutions: Interview Guide

The interviews for this study are semi-structured and based on a set of open-ended questions that will allow the researcher to gather responses to specific questions but also to explore unexpected themes or novel insights more fully.

The following questions will be explored to greater and lesser depths depending on the background and expertise of individual interview subjects.

1. Based on your experiences, what are the similarities and differences between the 11 Alberta CCIs? Which differences are most significant, especially as it relates to distributed learning delivery?
2. From your perspective (provincial systems level, senior institution level, operational institution level, external consultant), what are the most important issues or factors to consider when planning for distributed learning delivery within Alberta's CCIs? How do these issues or factors relate to or affect one another?
3. Have you ever engaged in formal planning for distributed learning delivery? What methods were used? In what ways were these methods useful or not useful?
4. What made these approaches more or less effective in accomplishing their intended outcomes?
5. To what degree were these approaches the result of specific planning processes? To what degree were these approaches the result of informal or emerging practice?
6. What other approaches to planning within PSIs have you observed? Which have been most effective? Why?
7. If you were starting a new planning process for distributed learning delivery, how would you proceed? Who would be involved? Based on your experience, what would you do differently if you could go back and redesign your own distributed learning delivery system?
8. From your perspective (provincial systems level, senior institution level, operational institution level, external consultant), how do the Alberta CCIs compare in their approaches to distributed learning delivery? In what ways do the unique attributes, mandates, locations, histories, or other factors contribute to their different or similar approaches? In what ways are their approaches aligned or misaligned with system goals and priorities?
9. What kinds of structural, cultural, and procedural shifts might be useful or even required to enable or enhance effective distributed learning practices within Alberta CCIs, and how might these issues affect the development of a conceptual framework for planning of distributed education? For example, are there any existing practices at your institution or that you have observed elsewhere that may act as barriers to effective planning and implementation of distributed learning?
10. What governance structures—both internal and external to a college—act as facilitators or barriers to the planning and sustained success of distributed learning initiatives?

11. What social, political, economic, educational, or technological developments do you believe are likely to be of most influence in shaping planning for distributed learning within Alberta's CCIs over the next three to five years?
12. Based on the social, political, economic, educational, and technological developments we've discussed, what distributed learning scenarios seem most likely to you for Alberta's CCIs over the next three to five years? Which of these seem more likely? How can Alberta's CCIs best plan to meet the demands of these scenarios?

## Appendix B

Athabasca University Research Ethics Certificate

Athabasca University
RESEARCH CENTRE

April 05, 2016

Mr. Russell Wilde
Centre for Distance Education\Doctor of Education in Distance Education
Athabasca University

File No: 21802
Certification of Ethics Approval Date: May 14, 2015
**New Renewal Date:** May 13, 2017

Dear Russell Wilde,
Your Renewal Form has been received by the AU REB Office.

Athabasca University's Research Ethics Board (REB) has **approved** your request to renew the *certification of ethics approval* for a further year for your project entitled "Planning for Distributed Education within Alberta's Comprehensive Community Institutions".

As you progress with the research, all requests for changes or modifications, ethics approval renewals and serious adverse event reports must be reported to the Athabasca University Research Ethics Board via the Research Portal.

To continue your proposed research beyond May 13, 2017, you must apply for renewal by completing and submitting an Ethics Renewal Request form before expiry. Failure to apply for **annual renewal** before the expiry date of the current certification of ethics approval may result in the discontinuation of the ethics approval and formal closure of the REB ethics file. Reactivation of the project will normally require a new Application for Ethical Approval and internal and external funding administrators in the Office of Research Services will be advised that ethical approval has expired and the REB file closed.

**When your research is concluded**, you must submit a Project Completion (Final) Report to close out REB approval monitoring efforts. Failure to submit the required final report may mean that a future application for ethical approval will not be reviewed by the Research Ethics Board until such time as the outstanding reporting has been submitted.

If you encounter any issue with the Research Portal's online submission process, please contact the system administrator via research_portal@athabascau.ca.

If you have any questions about the REB review & approval process, please contact the AUREB Office at (780) 675-6718or rebsec@athabascau.ca.

Sincerely,

Office of Research Ethics

## Appendix C

Initial Coding System

Table C1

*Initial Coding System*

| Code | Coded segments of all documents |
|---|---|
| **technology** | 76 |
| **eCampusAlberta** | 74 |
| **role of government** | 65 |
| **access** | 58 |
| **planning** | 50 |
| **governance** | 44 |
| **leadership** | 44 |
| **costs and funding** | 42 |
| **teaching and learning** | 37 |
| **change** | 35 |
| **collaboration** | 34 |
| **innovation** | 33 |
| **sustainability** | 31 |
| **partnerships** | 30 |
| **delivery mode** | 30 |
| **flexible** | 29 |
| **centralization vs. decentralization** | 29 |
| **technology infrastructure** | 29 |
| **quality assurance** | 28 |
| **community** | 27 |
| **technology as strategy** | 26 |
| **institutional culture** | 26 |
| **campus alberta** | 26 |
| **technology integration** | 25 |
| **decision making** | 25 |
| **committees** | 24 |
| **demographics** | 24 |
| **rationale for DE** | 23 |
| **economy** | 23 |
| **regional stewardship** | 23 |
| **institutional organization** | 22 |
| **first nations** | 22 |
| **provincial system** | 21 |
| **institutional consolidation** | 20 |

| | |
|---|---|
| **scenario** | 20 |
| **collaboration vs. competition** | 19 |
| **faculty** | 19 |
| **stakeholders** | 19 |
| **pathways** | 18 |
| **professional development** | 18 |
| **goals and priorities** | 17 |
| **efficiency** | 17 |
| **student supports** | 16 |
| **politics** | 15 |
| **mandate** | 14 |
| **executive team** | 14 |
| **leadership style** | 14 |
| **coordinated planning** | 14 |
| **geography** | 14 |
| **innovation vs. activity vs. planning** | 13 |
| **cost-effectiveness** | 13 |
| **risk** | 13 |
| **similarities and differences between CCIs** | 12 |
| **diversity** | 12 |
| **changing student demographics** | 12 |
| **budget** | 12 |
| **rationalization** | 11 |
| **program design** | 11 |
| **changes in society** | 11 |
| **shared understanding** | 11 |
| **centralized learning technology services** | 11 |
| **curriculum development models** | 11 |
| **support model** | 11 |
| **executive champion** | 10 |
| **elements of effective planning** | 10 |
| **leadership deficits** | 10 |
| **success criteria** | 10 |
| **international education** | 10 |
| **distance** | 10 |
| **executive commitment** | 9 |
| **urban vs. rural** | 9 |
| **self-interest** | 9 |
| **vision** | 9 |
| **student expectations** | 9 |
| **scenario** | 8 |
| **barriers** | 8 |
| **entrepreneurial activity** | 8 |

| | |
|---|---|
| **planning timelines** | 8 |
| **top-down vs. bottom-up** | 8 |
| **policy** | 8 |
| **institutional interdependence** | 7 |
| **eCampusAlberta 2.0** | 7 |
| **21st-century skills** | 7 |
| **stakeholder engagement** | 7 |
| **instructional model** | 7 |
| **campus space** | 7 |
| **alternative credentialing** | 7 |
| **different understandings of distributed learning** | 7 |
| **institutional diversity** | 6 |
| **new research question** | 6 |
| **distributed learning is no longer alternative learning delivery** | 6 |
| **aspiration** | 6 |
| **workplace learning** | 6 |
| **applied research** | 6 |
| **differential benefits of system collaboration** | 6 |
| **survival** | 6 |
| **goals** | 6 |
| **control** | 6 |
| **transform institution** | 6 |
| **cloud computing** | 6 |
| **institutional control** | 6 |
| **mission** | 6 |
| **transfer** | 6 |
| **enrolment trends** | 6 |
| **entrepreneurship** | 6 |
| **socio-cultural role** | 6 |
| **plar** | 6 |
| **competition for students** | 6 |
| **business models** | 5 |
| **champion** | 5 |
| **provincial culture** | 5 |
| **pace of change** | 5 |
| **measurement of performance** | 5 |
| **security and privacy** | 5 |
| **history of universities and colleges** | 5 |
| **outcomes** | 5 |
| **incentives** | 5 |
| **third-party services** | 5 |
| **values** | 5 |

| | |
|---|---|
| **jobs** | 5 |
| **bandwidth** | 5 |
| **political climate** | 5 |
| **distributed** | 5 |
| **planning methods** | 5 |
| **consortia** | 4 |
| **market opportunity and saturation** | 4 |
| **sophistication** | 4 |
| **access vs. efficiency vs. sustainability** | 4 |
| **BoG autonomy** | 4 |
| **faculty autonomy** | 4 |
| **CCIs as access point vs. institutions** | 4 |
| **institutional autonomy** | 4 |
| **autonomy** | 4 |
| **collaborative governance** | 4 |
| **eggs and omelets** | 4 |
| **change in leadership** | 4 |
| **support units** | 4 |
| **external forces** | 4 |
| **financial management** | 4 |
| **strategic goals** | 4 |
| **strengths** | 4 |
| **shared services** | 4 |
| **ubiquity of distributed learning at CCIs** | 4 |
| **staff support and training** | 3 |
| **systems** | 3 |
| **distributed education as driver vs. response to change** | 3 |
| **physical campus experience** | 3 |
| **opportunity cost of non-participation in distributed learning** | 3 |
| **drivers of distributed learning** | 3 |
| **organic collaboration** | 3 |
| **unbundling** | 3 |
| **lack of planning as a strategic decision** | 3 |
| **chasing the money** | 3 |
| **faculty role** | 3 |
| **learner centred** | 3 |
| **labour demand** | 3 |
| **disability** | 3 |
| **stability of players** | 3 |
| **institutional support for distributed learning** | 3 |
| **you can’t make history “unhappen.”** | 3 |

| | |
|---|---|
| **colleges vs. universities** | 3 |
| **Athabasca university** | 3 |
| **top down vs. bottom up** | 3 |
| **employer relationships** | 3 |
| **vision** | 3 |
| **buy vs. build** | 3 |
| **caution** | 3 |
| **completion rates** | 3 |
| **complexity** | 3 |
| **hidden agenda** | 3 |
| **copyright** | 3 |
| **open educational resources** | 3 |
| **central IT services** | 3 |
| **common systems** | 3 |
| **staffing** | 3 |
| **funding reallocation** | 3 |
| **student portal** | 3 |
| **mobile learning** | 3 |
| **discipline-based differences in distributed learning** | 3 |
| **social media** | 3 |
| **students as consumers** | 3 |
| **you don’t know what you don’t know** | 3 |
| **scale** | 3 |
| **planning value** | 2 |
| **concrete expression of intent and commitment** | 2 |
| **service region** | 2 |
| **institutional size** | 2 |
| **faculty vs. administrative influence** | 2 |
| **distributed education as competition for traditional classroom** | 2 |
| **duplication** | 2 |
| **distance learning as a driver or organizational growth and change** | 2 |
| **student role in planning** | 2 |
| **technology support** | 2 |
| **legitimacy of opting out of distributed education** | 2 |
| **validity of CCI designation** | 2 |
| **experience** | 2 |
| **market vs. regulated post-secondary environment** | 2 |
| **research capacity** | 2 |
| **retention** | 2 |
| **workplace integration** | 2 |

| | |
|---|---|
| **blended** | 2 |
| **choice** | 2 |
| **resistance to distributed** | 2 |
| **f2f vs. distance** | 2 |
| **urbanization** | 2 |
| **student readiness** | 2 |
| **skunkworks** | 2 |
| **pilots** | 2 |
| **revenue generation** | 2 |
| **consumerization of technology** | 2 |
| **keeping up with technology** | 2 |
| **time for change to happen** | 2 |
| **age** | 2 |
| **upgrading and distributed** | 2 |
| **differentiation** | 2 |
| **crisis** | 2 |
| **generative governance** | 2 |
| **ROI** | 2 |
| **massification** | 2 |
| **student faculty interaction** | 2 |
| **implementation planning** | 2 |
| **planning benefits** | 2 |
| **communication** | 2 |
| **lone rangers** | 2 |
| **role clarity** | 2 |
| **activity-based budgets** | 2 |
| **start-up costs** | 2 |
| **employee portal** | 2 |
| **opportunities** | 2 |
| **dual credit** | 2 |
| **skills shortages** | 2 |
| **common language in distributed learning** | 2 |
| **community resources** | 2 |
| **byod** | 2 |
| **competition for staff** | 2 |
| **cost vs. benefit of distributed learning** | 2 |
| **online registration** | 2 |
| **online counselling** | 2 |
| **shared behaviour** | 2 |
| **privacy** | 2 |
| **access vs. rigour** | 1 |
| **campus experience** | 1 |
| **branding for distributed education** | 1 |

| | |
|---|---|
| **hands-on vs. hands-off** | 1 |
| **further research** | 1 |
| **bookstore** | 1 |
| **VPA** | 1 |
| **formalization** | 1 |
| **technology as power** | 1 |
| **residential vs. commuter** | 1 |
| **similar vs. unique program offerings** | 1 |
| **outside consultant role in planning** | 1 |
| **attention to support services** | 1 |
| **respect for existing roles and structures** | 1 |
| **competency-based education** | 1 |
| **simulation** | 1 |
| **mooc** | 1 |
| **sotl** | 1 |
| **mobile technology** | 1 |
| **scalability** | 1 |
| **virtualization** | 1 |
| **ideology** | 1 |
| **discipline considerations** | 1 |
| **centre of plate** | 1 |
| **career focused** | 1 |
| **authority** | 1 |
| **retirement** | 1 |
| **comprehensive** | 1 |
| **assessment** | 1 |
| **outsourcing** | 1 |
| **interpersonal relationships and networking** | 1 |
| **definition of distributed learning** | 1 |
| **trades** | 1 |
| **residency requirements** | 1 |
| **outsized influence** | 1 |
| **faculty compensation** | 1 |
| **foundational learning** | 1 |
| **geographic overlap** | 1 |
| **ubiquity of technology** | 1 |
| **capacity** | 1 |
| **perception of quality** | 1 |
| **deinstitutionalizing** | 1 |
| **lead-partner** | 1 |
| **content** | 1 |
| **disruption** | 1 |
| **social justice vs. market forces** | 1 |

| | |
|---|---|
| **inclusive culture** | 1 |
| **ecampus as the concrete manifestation of campus Alberta** | 1 |
| **rationale** | 1 |
| **post-diploma programming** | 1 |
| **investment** | 1 |
| **knowledge-based society** | 1 |
| **individualization** | 1 |
| **activity-based costing** | 1 |
| **learning management systems** | 1 |
| **internet** | 1 |
| **integration** | 1 |
| **philosophical and pedagogical considerations** | 1 |
| **reimaging vs. enhancing** | 1 |
| **distributed expertise** | 1 |
| **academic freedom** | 1 |
| **business plans** | 1 |
| **weaknesses** | 1 |
| **SWOT** | 1 |
| **online media** | 1 |
| **program development** | 1 |
| **threats** | 1 |
| **online admissions** | 1 |
| **synchronous** | 1 |
| **facilities** | 1 |
| **uncertainty** | 1 |
| **environmental scan** | 1 |
| **language options** | 1 |
| **affordability** | 1 |
| **new Canadians** | 1 |
| **paradigm shift** | 1 |
| **eTutorAlberta** | 1 |
| **open studies** | 1 |
| **part time studies** | 1 |
| **strategic fit** | 1 |
| **rogue behaviour** | 1 |
| **similarities between post-secondary and other sectors** | 1 |
| **Total codes applied during initial coding** | 2,517 |
| **Total unique codes applied during initial coding** | 322 |

## Appendix D

Table D1

*Final Coding System Including Two Sub-code Levels*

| Top-level Code | Level 1 Sub-codes | Level 2 Sub-codes |
|---|---|---|
| **Provincial System** | • campus Alberta | • Athabasca university<br>• eCampusAlberta<br>• interpersonal relationships and networking<br>• collaboration vs. competition |
| | • differential benefits of system collaboration | • institutional autonomy<br>• institutional consolidation<br>• pathways<br>• rationalization<br>• self-interest<br>• shared understanding |
| | • mandate | • CCIs as access point vs. institutions<br>• institutional diversity<br>• regional stewardship<br>• socio-cultural role |
| | • politics | • history of universities and colleges |
| | • role of government | • market vs. regulated post-secondary environment |
| **Planning** | • complexity | |
| | • coordinated planning | |
| | • distance learning as a driver or organizational growth and change | |
| | • elements of effective planning | |
| | • planning benefits | |
| | • planning methods | • lack of planning as a strategic decision<br>• top down vs. bottom up |
| | • planning timelines | |
| **Leadership** | • change in leadership | |
| | • executive team | • executive champion<br>• executive commitment |

| | | |
|---|---|---|
| | • leadership deficits | |
| | • leadership style | |
| | • other champions | • outsized influence |
| | • vision | |
| **Technology** | • central IT services | |
| | • change | |
| | • cloud computing | • bandwidth<br>• virtualization |
| | • consumerization of technology | |
| | • deinstitutionalizing | |
| | • keeping up with technology | |
| | • mobile technology | |
| | • technology as strategy | • technology as power |
| | • technology infrastructure | |
| | • technology integration | |
| | • technology support | |
| | • ubiquity of technology | |
| **Rationale for DE** | • campus space | |
| | • opportunity cost of non-participation in distributed learning | |
| **Internal environment issues** | • institutional culture | • entrepreneurial activity<br>• faculty vs. administrative influence<br>• skunkworks<br>• values mission goals |
| | • institutional organization | • institutional size<br>• internal interdependence in DE |
| | • policy | |
| | • risk | |
| **External environment issues** | • changes in society | |
| | • demographics | • diversity<br>• first nations |

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|---|---|---|
| | • economy | • jobs |
| | • enrolment trends | • distributed education as driver vs. response to change<br>• distributed learning is no longer alternative learning delivery |
| | • geography | • service region |
| | • stakeholders | • employer relationships |
| | • student expectations | • physical campus experience |
| **Governance** | • BoG autonomy | |
| | • autonomy | |
| | • centralization vs. decentralization | |
| | • collaborative governance | |
| | • committees | |
| | • control | |
| | • decision making | • role clarity |
| | • faculty autonomy | |
| | • generative governance | |
| | • top-down vs. bottom-up | |
| **Academic and delivery considerations** | • business models | • affordability<br>• cost vs. benefit of distributed learning<br>• distributed education as competition for traditional classroom<br>• faculty compensation<br>• international education<br>• investment<br>• partnerships<br>• revenue generation<br>• scalability |
| | • faculty and staff | • professional development |
| | • instructional and delivery model | • access and flexibility<br>• alternative credentialing<br>• applied research<br>• delivery mode<br>• program design<br>• quality assurance |

| | | |
|---|---|---|
| | | • teaching and learning<br>• transfer and plar<br>• trends in higher education<br>• workplace learning |
| | • support units | • centralized learning technology services<br>• copyright<br>• online registration<br>• shared services<br>• student supports<br>• systems |
| **Costs and funding** | • efficiency | |
| | • financial management | |
| | • funding reallocation | |
| | • scale | |
| | • sustainability | |
| **Innovation** | • innovation vs. activity vs. planning | |

# Appendix E

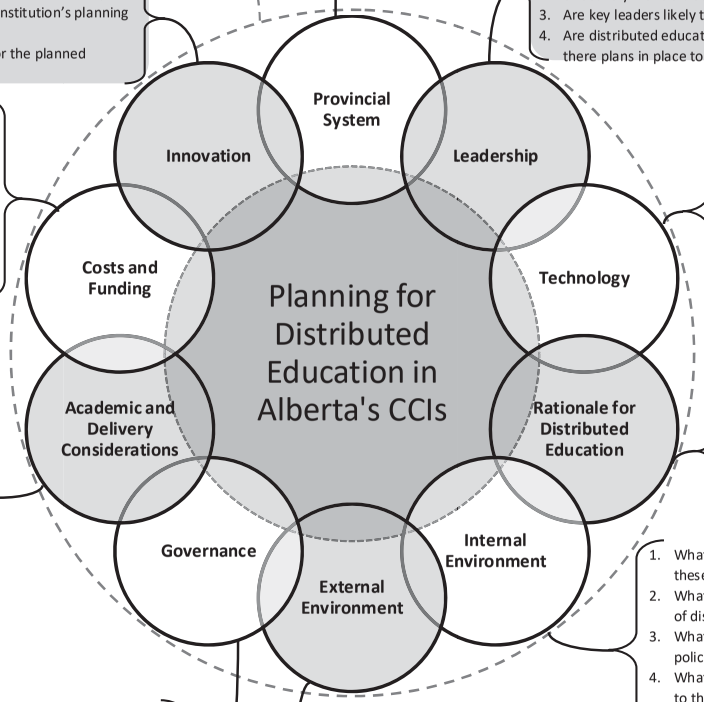
Guide to Planning for Distributed Education in Alberta's CCIs

Figure E1

*Guide to Planning for Distributed Education in Alberta's CCIs*

This figure is inserted on the following page.

# Guide to Planning for Distributed Education in Alberta's CCIs




1. What planning processes (especially academic) already exist at the institution? How do they or might they impact or intersect with any initiative to plan for distributed education?
2. What is the appropriate planning cycle for distributed education at the institution? How will this planning cycle be reconciled with rapid change and the need to respond to emerging opportunities?
3. What individual distributed education initiatives already exist at the institution? How will these be brought within the institutional plan for distributed education?
4. What are the significant stakeholder groups that should be consulted as part of the planning process? How will they be engaged?
5. What resources (i.e. time, effort, funding) will be required to complete the planning process? Who will be charged with leading the process?

1. What is the role and mandate of the institution within the larger provincial system? Will distributed education initiatives enhance or detract from this role and mandate from a provincial perspective?
2. How will the institution collaborate with other Alberta PSIs in the delivery of distributed education to maximize system efficiency? Will distributed education efforts result in unnecessary redundancy of program offerings across the province? How, if at all, does the role and mandate of Athabasca University impact such plans?
3. What are the unique historical, cultural, community, or other aspects of the institution and how will these be enhanced or otherwise affected by distributed education initiatives? How will issues impact planning and especially how might they positively or negatively impact collaboration with other institutions?

1. Is the vision for distributed education clear to executive, faculty, and staff at this institution? What formal documents will be used to make explicit statements about the place of distributed education at the institution?
2. Are there effective champions within the executive team and senior departmental leadership ranks that will be able to effectively move a distributed education agenda forward? If not, how will we address this gap?
3. Are key leaders likely to be in place long enough to make progress toward distributed education goals?
4. Are distributed education plans sufficiently aligned with provincial direction to avoid conflicts with the ministry? Are there plans in place to mitigate sudden shifts in ministry direction?

1. What innovative processes, methods, or offerings might be applied to distributed education practice that will deliver products and services of greater value to the institution's stakeholders (students, employers, government, etc.)?
2. How will such innovations be accounted for, protected from, and eventually made part of the institution's planning and operations processes?
3. What elements of the institution's culture and leadership might act as barriers or facilitators for the planned innovation?

1. What technological systems will be required to implement the distributed education program? Will these systems meet the expectations of students and other stakeholders?
2. To what degree will students' own consumer technology (laptops, tablets, smart phones, internet bandwidth) be a part of this system? How will the institution ensure student technology is sufficient for the needs of the program?
3. What institutional investments in equipment, support staff, software licenses, etc. will be required to implement the program? Are these resources both financially and logistically available?
4. Are there opportunities for greater cost efficiency through collaboration with other PSIs or through use of centralized cloud-based network and software services?
5. Are there any potential threats to established institutional strengths by adopting technology-based distributed education, e.g. will the potential deinstitutionalizing effect of networked learning technologies have a negative impact?

1. What is the purpose or rationale for the proposed distributed program? Is it primarily based on serving stakeholder needs or pursuit of funding opportunities?
2. What is the proposed business model? Specifically, what are the anticipated revenues and expenses for the proposed program?
3. What assumptions are being made in calculating revenue, expenses, and scalability? If these assumptions change over time, how will program sustainability be impacted?
4. Could program efficiency and sustainability be enhanced through collaboration with other PSIs?
5. What are the political implications of not seeking inter-institutional collaborations or other forms of provincial system efficiency?

1. What is this institution's rationale for pursuing distributed education delivery? Is it based on specific perceived needs or demands of potential students, increased access, provincial directive, enrolment targets, space considerations, costs savings, etc.?
2. Is there specific, credible evidence to suggest that distributed education will lead to such outcomes?
3. How will the institution measure or otherwise evaluate the contribution of distributed education to the attainment of such outcomes?

1. What are the potential academic consequences of any innovative business models or partnerships for distributed education? What unintended consequences should be considered?
2. Would distributed education increase access for students in programs under consideration?
3. Are there opportunities to use multiple forms of distributed education, such as online and workplace, to better achieve learning outcomes or increase access and program flexibility?
4. How will quality be maintained in distributed education programs? What standards will be used and how will ongoing quality be measured?
5. What are the unique pedagogical requirements of the discipline being considered for distributed education programming? How will these requirements be met in a distributed environment?
6. What student support services (registrar, counselling, library, etc.) will need to be adapted or coordinated to meet the needs of distributed learners?
7. What additional faculty supports might be required to ensure quality teaching in a distributed environment?

1. What are the unique features of the institution, including size, location, demographics, etc.? How might these impact adoption of distributed education amongst various stakeholder groups?
2. What are the unique aspects of the institutional history and culture? How might these impact adoption of distributed education amongst various stakeholder groups?
3. What institutional policies or practices exist to support distributed education functions? What new policies or decision-making mechanisms will be required to enable the intended initiative?
4. What changes will be required to internal institutional processes, coordination, and culture in response to the technologies or other innovations implemented as part of the distributed education program?
5. How might working relationships between existing departments and functions be impacted by distributed education? How might organizational structures and relationships need to be adapted to enable the intended initiative?

1. Will the institution adopt a centralized or decentralized approach to governance and administration of distributed education? What are the advantages and disadvantages of each approach within the specific institutional context?
2. How will existing roles, committees, and organizational structures or hierarchies be impacted by this decision? Will any new roles, committees, or organizational structures be required to provide effective governance?
3. Will all distributed education be governed within a single structure or will some innovative or pilot programs be given greater autonomy? If so, how will such initiatives eventually be reintegrated within the institutional governance structure?
4. Does the proposed distributed education program overlap with any other Alberta PSIs—especially within the CCI sector? If so, is any coordination of programming required? Are any partnerships or collaborations possible? How will these be handled in the absence of eCampusAlberta?
5. In a post-eCampusAlberta provincial system, what new structures or working relationships should be considered between the PSIs—especially with other CCIs? What messaging regarding distributed education governance should be communicated to the ministry from the college executive team and board of governors?

1. What are the population and enrolment trends for the institution's region? Will distributed education programs mitigate the impact of these trends on the institution?
2. How diverse is the population served by the institution? Are there specific groups within the institution's region that could be better served through distributed education options?
3. Is the proposed program and delivery mode being driven by expressed student needs or expectations?
4. Will the proposed program lead to employment opportunities for students within the institution's region?
5. How will the location of the institution impact its ability to attract and sustain staffing required for distributed education programs?
6. How is the proposed program aligned with other CCI offerings? Is it situated within a unique niche or will it be perceived as increasing system redundancy?