

NOTE:

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DISTANCE EDUCATION IN A DUAL-MODE HIGHER-EDUCATION INSTITUTION: A CANADIAN CASE STUDY

Introduction

The University of British Columbia (UBC) is dual mode institution, teaching principally on campus but offering some programs at a distance. This case study focuses on changes in the distance education unit at UBC between 1995 and 2005, and reflects the perspective of the author who was Director of the unit between 1995 and 2003.

Background

UBC is a large Canadian public research university. In the 2002-2003 academic year, its operating budget was just over \$100 million Canadian (US\$67 million), with 39,224 students, or 34,329 full-time equivalent (FTEs). Only 907 FTEs (2.64 per cent) were taking distance education (DE) courses, comprising some 7,500 student enrolments in over 100 courses. Although DE provision is important, most teaching is done on campus.

Why distance education at UBC?

As the only university at the time in a very large province, serving a scattered population, UBC introduced DE in 1949, mainly to in-service teachers, or students completing unfinished degrees, who were seeking to avoid the costs of travel or missing work. Over time, as student to teacher ratios increased, some staff offered correspondence-based versions of their courses, designed by a tenured faculty member but 'tutored' by lower-paid contract instructors.

Perhaps of equal importance, as students worked part-time to meet living costs and, more recently, to pay tuition fees, DE provided the flexibility of combining part-time work with study.

The context in 1995

In 1995, there were approximately 3,500 DE students enrolled through UBC Access, a partnership between UBC's Division of Continuing Studies and six of the 12 faculties. Almost all were taking third or fourth year undergraduate courses, over 70% were also taking courses on campus, about two-thirds had a full or part-time job, and over 80% lived within one and a half hours' drive from the campus. These learners were looking for flexibility rather than access. Nevertheless, 22% of all enrolments in UBC distance education courses are 'open' enrolments through other institutions (mainly the Open University of British Columbia)

Guided Independent Study (GIS) was a small department of twelve people within Continuing Studies responsible for the support of DE within the UBC Access partnership. They helped faculty instructors develop correspondence courses (print, with some audio and video cassettes), distributed materials, and provided support to students. They paid contracted part-time tutors, whose main responsibility was marking. GIS was developing about six new courses (or major revisions) a year, and maintaining about 70 existing courses. GIS had been without a full-time director for two years, and in 1995 was maintaining business as usual while waiting for a new director.

GIS was funded in three ways. It managed a grant of just under C\$1 million a year from the university's base operating budget. It received tuition fees for GIS courses, which it used to pay for tutors and learner support. This was roughly the marginal cost of adding each student after course development costs were paid, and allowed UBC to increase enrolments without additional cost to the university's base grant. Lastly, it received \$150,000 each year from

the Open University Planning Council, all of which was used to pay professors to develop courses, and for any materials or media production.

In the wider context, the British Columbia provincial government announced in 1994 that 1.5% of institutional base grants would be withheld to create an innovation fund for which institutions could bid. For UBC, this amounted to C\$4 million. In a single bid, it proposed a comprehensive, university-wide set of innovations, including a Centre for Educational Technology and over 60 faculty-based technology projects. WebCT, the major online course development platform now in use, was one outcome of this process.

At this time, UBC was seeking a new Director of GIS. The Vice-President Academic considered that expertise in DE and technology would facilitate new DE developments and contribute to policy and strategy for technology in teaching throughout the university. The Associate Vice President for Continuing Studies saw a re-invigorated, online distance education program as eventually leading to increased revenues for the university, and agreed to fund the new position.

The mandate for change

The new director received a clear mandate for change:

- move from print-based correspondence to online courses
- increase revenues from DE
- act as change agent, to support an increased use of technology for teaching both on and off campus.

Strategies for change

The new director, in frequent discussion with the staff of GIS, and regular but less frequent meetings with the senior administration (in particular, the Associate VP, Continuing Studies, but also the VP Academic and individual deans), engaged in several strategies for change over the period 1995 - 2003:

1. Funding

(a) *transparency*. Identifying the GIS budget took nearly six months, revealing approximately \$500,000 in unspent funds. Requests for funds were determined by the director, and occasionally the VP Academic. The new director decided to allocate and track fixed funds transparently each financial year, under operational headings: to external departments, for course development, course delivery, general management, reserve, and later, for contract work and research. Revenue was also tracked by source (DE grant, tuition fees, contracts and research grants). At the end of each financial year, consolidated accounts for GIS were drawn up.

(b) *re-allocation*. One faculty consumed over one third of the DE grant (\$350,000) flying instructors around the province for in-service training for less than 500 students. Another \$300,000 was allocated to support library services, an external audio-visual media unit, and co-ordinators of DE in two faculties. The remaining funds were used to support course maintenance and pay the salaries of the course developers in GIS. The \$150,000 from the Open University Planning Council (OUPC) was used for the cash costs of all new course development. (This ceased in 1997 when the government withdrew funding for the OUPC. The reserve fund and further re-allocations made up this shortfall.)

First, the Director proposed canceling flights by individual professors and reallocating funds for new course production. The VP Academic supported this over strong objections from the dean (who threatened to resign). The

Director also ended the UBC Access agreement with six faculties and encouraged all twelve faculties to request funding for the development of online DE courses.

(c) *consultation*. The Director invited each dean to nominate an academic to a new Advisory Committee for Distance Education. All proposals for funding new course development (and major course revisions) went through this committee to the V.P. Academic for formal approval.

2. Re-branding

As 'Guided Independent Study' did not accurately describe its new activities, the department became 'Distance Education and Technology' (DE&T) and later developed a web site (<http://det.ubc.ca>) for students, instructors and the external public.

3. Staffing

Staff were committed to DE with expertise in student support, instructional design and project management but lacked leadership, and skills critical for the new mandate. The following strategies were implemented:

(a) *security of employment*. From the outset, the director made a commitment that all existing staff were highly valued, but some work functions would change.

(b) *new hires*. The urgent need was for a webmaster, to recommend appropriate technology for online teaching, to get courses online and to provide technical help for staff and students. As activities expanded, new staff were hired, including a marketing manager with experience in developing new support systems. Increased enrolments saw additional learner support

staff employed. The job of the Manager, Administration was split, to focus on finance and HR, and a new Manager, Student Services (later called Learner Support) was hired. The director guided new online course design, and increasing contract revenue funded new course developers. Additional contract work, new programming, a doubling of course enrolments, and external research grants saw 12 staff in 1995 grow to 28 by 2003.

(c) *redefinition of duties*. A text editor was re-trained as a webmaster, a media producer was retrained as a course developer, and media production was outsourced to the university's audio-visual department. A course developer was promoted to manager of course production.

4. Project management

In 1995, the unit was developing about six new courses, and maintaining about 70, per year. No standards applied for the time or effort involved in developing a course but fine tuning of a project management model over some years saw approximately twelve new courses a year and 110 courses maintained in 2003. The budget now included both cash and an allocation of time for course developers and instructors.

Within standards for online development and delivery reflecting both research findings and constrained resources, academics and a DE&T course developer worked closely together, the latter drawing on the specialist skills of web programmers and media producers as necessary. Maintenance of over 100 courses each year was also built into the costs.

The director integrated the project management system with applications for funding. Over time, new staff were trained 'on-the-job' by experienced course developers, who also helped instructors design and cost new course proposals before they were submitted to the Advisory Committee.

Project management enabled the unit to double in size and increase course quality between 1995-2003. The DE&T model enabled professional instructional designers/project managers and media producers to be hired as regular employees, enabling expertise to develop and be shared. High quality, cost-effective online programming was produced at the same or lower cost per student as face-to-face teaching.

However, many academics objected to the project management model, preferring to receive university funds directly for DE development with their own part-time graduate students hired to help. The requirement they sign an agreement that spelled out team responsibilities and intellectual property rights (essential in a project management model) was successfully challenged at the B.C. Labour Relations Board by the Faculty Association (which had exclusive industrial bargaining rights for academics) in 2003 on the grounds that it constituted conditions of employment. The university is appealing this decision.

5. New revenues

The director's position was funded in the belief that online DE would generate new revenues for UBC primarily from new non-credit DE programs (all programming up to 1995 was aimed at third and fourth year undergraduate credit course completion). It did not work out this way though.

(a) *non-credit DE programs*. The Division of Continuing Studies is responsible for non-credit programming at UBC. There are several different departments, each with its own director and a mandate to be fully cost-recoverable, if not profit-making for the rest of the university. The new director was unsuccessful in persuading other directors to develop online distance programs, at least between 1995 and 2000. There were several reasons for this:

fear that conventional students would move online, costs would increase, and constrained departmental staffing would not be sufficient for the new initiative. In one case, a director believed (incorrectly) that he could generate more profit by working alone than with the DE&T unit. This resistance turned out to be fortunate, because events after 1995 showed that credit, not non-credit, programming was the main market in Canada for online DE.

(b) *credit certificates* Also in 1995, the new director was approached by Tec de Monterrey, a large private university in Mexico. DE&T signed a contract in 1996 to develop a program of five courses on technology-based distributed learning (TBDL), aimed primarily at working professionals in the post-secondary education sector. These were integrated into the Master in Educational Technology at Tec de Monterrey which paid half the development and maintenance costs, and had the rights to offer these courses throughout Latin America. UBC had the rights for the rest of the world.

UBC offered the same five courses for continuing professional education to students on a global basis as a post-graduate certificate in technology-based distributed learning. Students could also transfer these five courses into Athabasca University's Master of Distance Education or as electives within UBC's Master of Education if they had been admitted to UBC's graduate school (mainly campus-based students).

DE&T designed these courses, tutored the UBC program, and provided full administrative and support services. This 'one-stop shopping' service was parallel to the UBC main systems, which could not handle international students at a distance until recently. The Department of Educational Studies in the Faculty of Education provided academic approval. The courses used a combination of the World Wide Web, printed textbooks and articles, and satellite TV (in Latin America). The same course material, assignments and

marking schemes were used for all participants, although Tec de Monterrey was responsible for recruiting, tutoring and accrediting its own students.

Altogether a total of 424 students enrolled in the TBDL program (811 course enrolments) through UBC in the six years between 1996-97 and 2001-2002, from 40 countries as dispersed as Mongolia, New Zealand, Argentina, Finland, South Africa and Puerto Rico. Nevertheless, 44% came from British Columbia, and two-thirds from Canada as a whole. However, although only a third in total were international, they made cost recovery possible.

There were over 1,500 student enrolments in the program through Tec de Monterrey, many their faculty or teachers in high schools. The TBDL program fully covered its costs, including the time of DE&T staff working on the program, from student fees and franchise payments from Tec de Monterrey. It also turned over a small profit to the Faculty of Education and Continuing Studies. The program closed at the end of 2001-2002, as a result of the development of a new master's program in educational technology (MET).

(c) *masters program for continuing professional education* At the end of 2000, Tec de Monterrey proposed converting the post-graduate certificate into a full joint Master's degree, for the school and post-secondary sectors. DE&T had no expertise in the school sector but was supported by the Faculty of Education and the senior administration at UBC, who sought a strong strategic partnership with Tec de Monterrey. The Masters' program was approved in June, 2002; the first two courses opened that September; and the first students graduated in June 2004. Two certificates were also developed using courses within the Master's degree for those students who do not want a full degree.

Students pay approximately US\$1,000 per course (C\$1,250), or US\$10,000 (C\$12,500) for the whole degree. The fully operational program will bring in

revenues of C\$700,000 a year (US\$525,000), more than covering costs, including overheads.

The joint program in English enrolls about 80 students, building to 280 a year. In addition, Tec de Monterrey offers a Spanish version to over 200 students. DE&T assisted in developing the business plan and course development for this program.

The new Master in Educational Technology program was pioneering in several ways:

- it is UBC's first joint degree with a foreign university
- it is UBC's first degree available fully at a distance
- it is UBC's first full program available totally online
- the program is available globally in both English and Spanish
- the program opens up UBC graduate degrees to international students without detriment to local students
- the program enables large enrolments at a graduate level
- for the first time at UBC, certificate students are permitted to transfer their certificate credits to a full Master's degree
- the program enhances the Faculty of Education's international profile and adds momentum to its becoming a leader in educational technology
- the program fully covers costs from student tuition fees, provides scholarship funds, and brings additional revenues to the Faculty of Education
- a sophisticated business planning process was used to reduce risk and stimulate faculty acceptance
- new tenured research faculty are hired from program revenues

- the program facilitated improved online administrative services, such as application, admission, fee payment, course registration, throughout the university
- there is an emphasis on inter-cultural, collaborative learning within courses
- joint course development with faculty from Tec de Monterrey helps to provide internationalization of the curriculum.

DE&T worked with several other partners on similar post-graduate programs in rehabilitation sciences, microbial infection and knowledge management.

The new credit-based continuing education programs led by example, showing what could be achieved through DE fully online. Their successful, sustainable business model enabled new research professors to be hired and new revenues to be generated for the faculties.

(d) *consultancies and contracts* From early online success, the reputation of its director and staff, its growing research base, and its quality assurance processes, DE&T started to generate income from consultancies and workshops, particularly in the United States, Mexico and East Asia for international and government agencies and educational institutions. It helped other organizations develop their own online programming, and publishers to develop online support for text-books, providing professional development for staff and rapid unit growth.

(e) *business plans* In order to kick-start cost-recoverable programming, DE&T was permitted to borrow money from the university, to be re-paid with interest over a five year period. This required strong business plans for new programming, based on market research, accurate costing, realistic fees, and risk avoidance strategies. Business planning was facilitated by research on the costs of online learning (see 'Research' below).

6. Research

The new director brought a research grant with him to UBC in 1995. Subsequent grants totalling almost \$500,000 saw DE&T research the costs and management of e-learning continuously between 1995 and 2003, resulting in the development of a research centre called MAPLE (Centre for Managing and Planning Learning Environments) and accurate costing of the development and delivery of e-learning programs.

Sustainable success

Arguably, DE&T was very successful in terms of the goals set for it in 1995. Undergraduate distance students increased from 3,520 in 1996 to 6,170 (75% or 10% per year (UBC's total enrolments increased 1.5 to 2% per year over the same period). The number of DE courses increased from 70 in 1995 to 130 by 2003, of which 70 were fully online, adding flexible options to face-to-face teaching. New programming areas in professional continuing education were established on a sustainable cost-recovery basis.

DE&T brought quality assurance and economies of scale to the development and support of DE programs and students, resulting in high completion rates and exam performance comparable to that on-campus. Some pressure was taken off face-to-face classes, particularly in the Faculty of Arts.

Research and consultancy funding generated revenue and kept UBC up to date in online and distance education. DE&T developed innovative market-driven approaches to online teaching and professional continuing DE, opening up the lifelong learning market on a sustainable basis.

Nevertheless, none of this was sufficient to protect the DE&T unit. Following a departmental review and the retirement of the director in 2003, the VP Academic's office decided to restructure the unit. Course production and delivery would be devolved to the Faculties, and student services for distance education students to central administrative units such as the Registry. The DE&T unit was slated to be wound up at the end of April 2005. To understand the reasons for this, it is necessary to look at what was happening in the rest of the university between 1995 and 2003.

Parallel developments in e-learning at UBC and their impact on distance education

The future of DE&T was affected by a change of Vice-President, Academic in 1998 and a new UBC strategic plan, called Trek 2000 which identified new academic goals or priorities. One of the six headings under 'learning' was:

6. Develop alternative ways of delivering credit and non-credit programs to students unable to attend classes at regular hours or on campus. Create new programs that address the life-long learning needs of citizens in a knowledge-based society. Expand our continuing higher education programs at the graduate level and in professional upgrading, to provide unique distance learning opportunities throughout the province.

Many students are prevented by work schedules, or by distance from Vancouver, from registering in desired courses or programs. To assist such students, we should expand current initiatives in distance learning, and re-think the patterns of instructional scheduling; for example, by creating a "week-end college" for students unable to attend during the week. There is also a growing demand for postgraduate study and professional upgrading among adult learners unable to enrol in programs on campus; through Continuing Studies, we should try to meet the needs of such students, drawing on all aspects of multimedia and distance learning.'

The new Vice-President Academic was responsible for the implementation of Trek 2000. He established 'The Academic Committee for the Creative Use of Learning Technologies' (ACCULT) which was chaired by a new appointment, the Associate Vice-President, Academic Programs, who reported directly to him. ACCULT, which included the director of DE&T, had to recommend on the implementation of the above academic goals with respect to learning technologies. Its final report in 2002 recommended among other things: a major increase in 'mixed mode' (mix of face-to-face and online) and fully distance courses; the development of learning technology support units within faculties; the recruitment of more learning technology support staff; the creation of a new position, Director of Learning Technologies; and an advisory committee drawn from 'users' of learning technologies across the university. Perhaps the most important recommendation though for DE&T was :

'Leaving main LT spending priority decisions with faculties and their units.'
(http://www.maple.ubc.ca/research/accult/index_accult.html).

Also in this period, the AVP, Information Services, was given the responsibility to develop a university-wide 'e-strategy' and DE&T staff found it increasingly difficult to become major players in this development.

The intention to integrate all LT activities into the faculties became clear in the revision of Trek 2000 in 2004. There is no mention now of DE or Continuing Studies. Instead, one of three priorities under 'learning' is:

'Review the methods by which learning is delivered, including scheduling of courses and the structure of undergraduate programs.

- Encourage Faculties to continue developing innovative approaches that expose undergraduates to research-based and experiential learning.
- Make the big small wherever possible: provide individualized services experiences to students within Faculty-based or program-based communities.

- Using the e-strategy framework, develop new technologies to aid in learning and in the delivery of instruction in a variety of modes and contexts.'

Thus DE, as an area in its own right or as a separate area of professional expertise was seen to be increasingly marginalized.

A change of mind

However, the plan to decentralise was suddenly scrapped at the last minute (in April, 2005, two weeks before the unit was to be closed). Nearly two thirds of all distance education enrolments were credit students in the Arts faculty. The Dean became increasingly concerned that the revenues generated by the distance education student tuition fees would not cover the costs of providing appropriate student support and course maintenance in her faculty. A new VP Academic and a new Associate Vice-President were now in place, and it was decided to abandon the devolution of course production, maintenance and learner support. Instead, DE&T would be merged with the Office of Learning Technologies.

Conclusions

The weakness of the DE&T model was that Deans had little direct influence over DE activities, and the growth of distance enrolments did not result in increased revenues for the Faculties (with the exception of the continuing education masters' programs). With the central DE unit managing most of the funding, there was no significant financial incentive for either individual faculty members or for academic departments.

The senior administration supported the decentralized control of teaching and the integration of learning technologies. In particular, they believed transferring the highly valued professionals from DE&T to the Faculties

would strengthen the use of e-learning in the classroom as well as for distance education.

On the other hand, staff in DE&T were particularly concerned about the lack of understanding by the senior administration and the Faculties of the special learner support needs of students studying fully at a distance, and the loss of a professional centre for DE course design. The senior administration were deaf to arguments from DE&T staff about the potential loss of cost-effectiveness and quality in distance education programs as a result of small-scale and duplicated services within each Faculty.

However, the reality was that although distance education students are a relatively small number of total enrolments, their needs are different, and the provision of services to distance education students required greater changes and more responsibility than the academic departments realised.

The whole restructuring process was dragged out over a three year period then suddenly cancelled. The DE Director and staff were not party to the behind-the-scenes decision-making within the VP Academic's office, which seemed to be more influenced by the financial demands of one or two Deans than the needs of distance education students. As a result, most of the specialist DE&T staff left to work in other organizations.

It is also a mistake to think that e-learning is no different from distance education. E-learning comes in many different forms, from supplements to classroom teaching, to blended or mixed mode, to fully online. Although there is a continuum of e-learning design, fully distance students tend to be different (older, part-time, more independent), require special services (courses specifically designed for off-campus use), and different financial and administrative arrangements from on-campus students. These all point to the need for a specialist department to serve their specialized needs.

Finally, though, there may still be a good case for decentralising services, to ensure that distance education is seen as a mainstream rather than a marginal activity with the Faculties. Such structural change though needs a much more inclusive change management process that ensures the skills of specialist distance educators are valued and and incorporated into any such restructuring.

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