DISTANCE EDUCATION AT A U.S. PUBLIC, LAND GRANT INSTITUTION: A CASE STUDY OF FACULTY REWARD FOR JUNIOR FACULTY WHO TEACH VIA DISTANCE

by

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DEDICATION

To my husband and my doggies, my world. Without them, I am but a blank page.

To my mother, who believes everything I do is an accomplishment. Her support and
unconditional love are always with me.

To my brother, Billy, who continuously expressed (or feigned) interest
in my project as I forged ahead with it. Thanks for being you.

Thank you to all of my family members and dear friends who
have generously supported me throughout my journey
at the University of Michigan.

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ABSTRACT

On many campuses in the United States, distance education is fast becoming an integral part of the fabric of academic life, and this has implications for existing reward structures for faculty at these institutions. In addition, distance education is becoming an increasingly important element to the outreach mission of a number of departments at college and university campuses.

This case study focused on Michigan State University, a land grant, public institution of higher education that has been offering distance education courses and programs for over a decade, and utilizes faculty members at all levels for distance education instruction. The intention was to explore how Michigan State University translates its values regarding distance education into reward policy for junior faculty who teach via distance. Twenty-nine interviews were conducted: fourteen of the Michigan State University participants were faculty members, eight were administrators, and seven were support staff from the five departments who together handle the online and blended learning needs for the institution.

Overall, study findings indicate that Michigan State University utilizes distance education to generate an alternative source of revenue and remain competitive with other higher education institutions. Academic subunits vary with regard to faculty reward for, and commitment to distance education efforts. At the same time, distance education is considered an enhancement to the institution's mission due to its ability to provide

outreach, increase student access, and provide flexibility for both faculty and students. The findings from this study can help us understand how distance education is valued, and how it fits into the culture of institutional rewards at a land grant, degree-granting institution in the United States. The study analysis demonstrates that values can be translated in a myriad of ways.

What emerged from the analysis of interview transcripts, and relevant policy documents and mission statements, led to the grounded theory components that higher education institutions can use to convey commitment to distance education through mission and faculty reward policies and practices.

CHAPTER ONE

OVERVIEW

"Our time is a time for crossing barriers, for erasing old categories - for probing around."   -- Marshall McLuhan

Introduction

Distance education and its attendant technologies are having a profound effect on the work of higher education faculty. Developments in information technologies have already changed how some courses are delivered, and how faculty members communicate with others. On many campuses in the United States (U.S.), distance education is fast becoming an integral part of the fabric of academic life, and this has implications for existing reward structures for faculty at these institutions. Callan (as cited in St. John & Parsons, 2004) argues that higher education policies should focus on the balance between institutional interests and market forces. And it has become increasingly clear that market forces include greater demand for distance education offerings for students. This 'commercialization' of higher education "refers to the process of transforming institutions' teaching, research, and service activities to compete with private enterprises in the larger economic marketplace" (Priest, St. John, & Boon, 2006, p. 2). Gappa, Austin, and Trice (2007) contend that to a significant extent, it is the faculty that enables higher education institutions to meet the numerous demands of the market.

Although many faculty members at U.S. institutions of higher education resist distance teaching for numerous reasons, including lack of technological skills, training, and time concerns, this study focuses on reward structures for junior faculty because of the interesting debate surrounding distance teaching's applicability in relation to tenure and promotion. Therefore, the objective of the study is to add to the body of research on distance education policy.

This dissertation project consists of a case study with a qualitative orientation, and focuses on Michigan State University, a land grant, public institution of higher education. Michigan State University (MSU) has been offering distance education courses and programs[1] for over a decade, and utilizes faculty members at all levels for distance education instruction. In fact, Michigan State University "basically considers themselves the leader of such courses and programs in the United States" (D. Gift, personal communication, March 20, 2007). **But how does Michigan State University translate its values regarding distance education into reward policy for distance teaching faculty, especially junior faculty?** Thus, it is MSU's decade-long commitment to, and success with distance education offerings that has fueled this researcher's interest in examining them for this study. And although with each passing year, the University of Michigan (a more convenient location for study) continues to expand its programs, business ventures and research areas, only three of the University's schools offer distance education programs,[2] resulting in a lack of subunits for analysis.

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[1] See Chapter Three for a detailed discussion of the MSU subunits examined for this study that offer distance education courses and programs.
[2] The three University of Michigan schools are the College of Engineering, the School of Nursing, and the Ross School of Business.

In this chapter, current conceptions of distance education are defined, and the importance of distance education in higher education is introduced to provide a context for the study and its intended contribution and significance. The purpose of the study is also presented for the reader.

Current Conceptions of Distance Education

The need to clarify terminology in this field is important. Terms associated with distance education[3] are often used interchangeably in the literature, thus it is necessary to clarify their differences.

Distance education is defined as instructional delivery that does not constrain the student to be physically present in the same location as the instructor (Distance Education Clearinghouse, 2001). Today, audio, video and computer technologies are the most common delivery modes. Distance education is the planned learning that normally occurs in a different place from teaching and as a result, it requires special techniques of course design, special instructional techniques, special methods of communication by electronic and other technology, as well as special organization and administrative arrangements (Distance Education Clearinghouse, 2001). This form of non-traditional learning can replace, extend, supplement, or build upon learning acquired in traditional ways. Holmberg's (1986) perspective of distance education is that it:

> Includes the various forms of study at all levels which are not under
> the continuous, immediate supervision of tutors present with their
> students in lecture rooms or on the same premises, but which,
> nevertheless, benefit from the planning, guidance and tuition of
> a tutorial organization (p. 26).

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[3] It is important to note that although there are various terms often used interchangeably in the literature in regard to non-traditional methods of instruction, for purposes of this paper, distance education will be used to encompass non-traditional methods of instruction (unless otherwise noted).

Adopting Holmberg's perspective on distance education, Larreamendy-Jones and Leinhardt (2006) take *online education* to imply "instruction through a connection to a computer system at a venue distant from the learner's personal computer" (p. 568). Seen this way, Larreanmendy-Jones and Leinhardt believe online education is both an instructional alternative for on-campus learning and teaching, and a case of distance education.

Distance learning is the desired outcome of distance education and is defined as the provision of academic courses and entire degree programs when instructor and students are geographically separated (Schwitzer, Ancis, & Brown, 2001). In the United States, the term distance learning has come to be used as a blanket term for the use of technologies in distance education (Keegan, 2002). Moore (1973; 2003) describes *distance teaching* or *teaching at a distance* as:

> All those teaching methods in which, because of the physical separation
> of learners and teachers, the interactive (simulation, explanation, questioning,
> guidance) as well as the proactive phase of teaching (selective objectives,
> planning curriculum and instructional strategies), is conducted through
> print, mechanical or electronic devices (p. 669).

E-learning "uses communication technologies to connect students and instructors separated by distance and/or by time" and "provides students with access to learning resources and interaction" (Morrison, 2007, p. 2). E-learning is a term that covers a wide set of applications and processes, such as Web-based learning, computer-based learning, virtual classrooms, and digital collaboration. It includes the delivery of content via Internet, intranet/extranet (LAN/WAN), audio- and videotape, satellite broadcast, interactive TV, CD-ROM, and more (Larreamendy-Joerns & Leinhardt, 2006; Murray,

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2007). E-learning may be used to describe any learning that is electronically mediated or facilitated by transactions software (Zemsky & Massy, 2004).

Blended learning is used to describe a solution that combines several different delivery methods, such as collaboration software or Web-based courses. Blended learning is also used to describe learning that mixes various event-based activities, including face-to-face classrooms, live e-learning (synchronous), [4] and self-paced learning (asynchronous). [5] Hofmann (2001) suggests, "The idea behind blended learning is that instructional designers review a learning program, chunk it into modules, and determine the best medium to deliver those modules to the learner" (p. 1). She says delivery can include technologies such as: 1) traditional classroom or lab settings; 2) reading assignments; 3) CD-ROM; 4) performance support tools; 5) asynchronous Web-based instruction; and 6) synchronous Web-based instruction. Table 1.1 compares synchronous electronic learning (e-learning) to asynchronous e-learning.

Context and Background

The increasing number of distance education offerings in the U.S. and abroad demonstrates that recognition of its worth appears to be growing. Although still a low

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[4] Synchronous instruction requires the simultaneous participation of all students and instructors. It is often referred to as "live, real-time," facilitated instruction and involves tools such as chat rooms, Web conferencing, and virtual worlds. Although online synchronous instruction eliminates place-bound constraints and allows for direct and immediate interaction among participants, it does not eliminate time-bound constraints. This is particularly evident in instruction that crosses numerous time zones (Retrieved June 16, 2007, from www.technologysource.org/extra/206/definition/1).

[5] Asynchronous instruction does not require the simultaneous participation of all students and instructors. It utilizes tools such as threaded discussion, listservs, and voiceboards (Retrieved June 16, 2007, from www.technologysource.org/extra/206/definition/2). Asynchronous learning is similarly defined as "Interaction between instructors and students that occurs intermittently," on demand with a time delay (Retrieved July 3, 2007, from http://www.learningcircuits.org/glossary; Murray, 2007).

Table 1.1   Synchronous versus Asynchronous e-Learning

	Distinctive Features	Examples
Synchronous e-Learning	♦ Real-time ♦ Live ♦ Usually scheduled and time specific (but can be impromtu) ♦ Collective and often collaborative ♦ Simultaneous virtual presence (with other learners and facilitators or instructors) ♦ Concurrent learning with others	♦ Instant messaging ♦ Online chat ♦ Live Webcasting ♦ Audioconferencing ♦ Videoconferencing ♦ Web conferencing
Asynchronous e-Learning	♦ Intermittent access or interaction ♦ Self-paced ♦ Individual, or intermittently collaborative ♦ Independent learning ♦ Usually available any time ♦ Recorded or pre-produced	♦ Email ♦ Threaded discussion ♦ Boards ♦ Web-based training ♦ Podcasting ♦ DVD ♦ Computer-based training

Source: Murray, M. (2007). Introduction to synchronous e-learning. In Brandon, B. (Ed.), *The eLearning guild's handbook on synchronous e-learning*, (pp. 1-2). Santa Rosa, CA: The e-Learning Guild.

priority at many higher education institutions in the U.S., distance education is becoming an increasingly important element to the outreach mission of a number of departments at college and university campuses. Farmer (2006) says research confirms, "that instructional and learning technologies, offered as distance education or complementing classroom instruction, can be more effective than traditional classroom instruction" (p. 230). Yet distance education is not without its critics. Earlier in the twentieth century, Veblen and Flexner were presented as major examples of criticism of correspondence study[6] within academia (Pittman, 2003).

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[6] Correspondence study is an historical form of distance education that will be discussed in detail in Chapter Two.

David Noble, a history professor who has worked at UCLA and Toronto's York University, has been particularly critical of online education. He argues it is leading to a dangerous relaxation of sound financial management practices and legal safeguards of the public interest (Young, 2000). Essentially, Noble has developed a Marxist critique of online education in which he sees an unholy alliance of corporations and university administrations combining forces to teach more students at lower cost, thus oppressing the faculty by eliminating positions and constraining their autonomy (Noble, 2001).

Jack Simmons (2000), of Savannah State University, echoes Noble and characterizes distance education as "a means by which universities may reduce their costs while increasing their enrollments" (p. 4). Simmon's argument also exhibits a strong concern about how changing modes of teaching could affect the teaching roles of professors, including academic freedom. Pittman (2003), however, points out that, ironically, Simmons, like Noble, disseminates this message on the Internet. And, Bok (2003) contends, "commercialization threatens to impair the university's reputation for objective, disinterested teaching and research" (p. 117).

Larreamendy-Jones and Leinhardt (2006) have observed two complementary movements in the educational landscape in regard to distance education: the merging of online teaching and learning in the stream of everyday practices at universities, and the increasingly salient role of distance programs in institutions of higher education. Farmer (2004) suggests:

> As more students work while attending college, the methods of
> instruction will have to accommodate these limitations the way
> Executive MBA programs have accommodated harried executives,
> and community colleges have turned to new forms of instruction
> that exploit the flexibility and effectiveness of learning technology
> (p. 187).

DesJardins, Dundar, and Hendel, (1997) argue that an institution has "a vested interest in understanding the factors that influence students' application and enrollment decisions in order to attempt to increase the 'fit' between students and the institution" (p. 4). Similarly, institutions also have a vested interest in increasing the fit between courses and programs offered and its reward structure for faculty who teach either in the traditional or non-traditional formats.

The National Center for Education Statistics (2003) reported that for 2000-2001, college-level, credit-granting distance education courses at either the undergraduate or graduate/professional level were offered by 55% (2,280) of all 2-year and 4-year higher education institutions in the U.S. with student enrollments of 2,876,000. And, a subsequent study conducted by the National Center for Education Statistics (2006) found that in 2004-2005, 62% of public and private, not-for-profit 2-year and 4-year higher education institutions in the U.S. offered distance education courses.

The Sloan Consortium, a consortium of institutions and organizations committed to quality online education, supports an annual study on the state of online education in U.S. higher education. Their 2005 report titled, "Growing By Degrees: Online Education in the United States, 2005" indicates that out of the 1,000 college and universities that responded to the survey, 65% of schools offering graduate face-to-face courses also offer graduate courses online; 63% of schools offering undergraduate face-to-face courses also offer undergraduate courses online; among all schools offering Master's degree face-to-face programs, 44% also offer Master's programs online; and, among all schools offering face-to-face Business programs, 43% offer online Business programs as well.

A subsequent 2006 study by Sloan titled, "Online Nation: Five Years of Growth in Online Learning" finds that 35% (around 1,500 total) of all higher education institutions in the U.S. are fully engaged in online education. According to Sloan, these institutions all believe that their online offerings are strategic, and thus, have been fully incorporated into each institution's formal strategic plan. In addition, Sloan reports that the number of students taking at least one online course (estimated at 3.48 million – an increase of 9.7% over the previous year) continues to expand at a rate far in excess of the growth of overall higher education enrollments (see Table 1.2). In fact, Sloan asserts that the growth from 1.6 million students taking at least one online course in Fall 2002 to the 3.48 million for Fall 2006 represents a compound annual growth rate of 21.5% (Sloan Consortium, 2007).

Yet, if distance education offerings at U.S. institutions of higher education continue to increase, additional faculty members will be needed to teach these programs. In fact, a great part of the success of distance education lies with faculty members who are motivated to invest in innovative teaching practices and who are adequately rewarded for doing so (Beaudoin, 1990; Dillon & Walsh, 2002; Olcott & Wright, 1995; Wolcott, 2003). However, the present criteria for rewarding faculty work[7] at many higher education institutions, based primarily on the scientific model of research and publication, can be counterproductive to reaching larger academic goals such as educating a greater number of students and satisfying the changing needs of modern students.

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[7] Reward structures will be discussed in detail in the literature review portion of this proposal.

Table 1.2   **Total and Online Enrollment in Degree-Granting**
                       Postsecondary Institutions – Fall 2003 Through Fall 2006

	Total Enrollment	Annual Growth Rate Total Enrollment	Students taking at Least One Online Course	Annual Growth Rate Online Enrollment	Online Enrollment as a Percent of Total Enrollment
Fall 2002	16,611,710	N/A	1,602,970	N/A	9.7%
Fall 2003	16,900,479	1.7%	1,971,397	23.0%	11.7%
Fall 2004	17,272,043	2.2%	2,329,783	18.2%	13.5%
Fall 2005	17,428,500	0.9%	3,180,050	36.5%	18.2%
Fall 2006	17,647,720	1.3%	3,488,381	9.7%	19.8%

Source: The Sloan Consortium. (2007, October). *Online nation: Five years of growth in online learning.* Needham & Wellesley, MA: Alfred P. Sloan Foundation.

Without adequate and valued rewards for this increasingly important dimension of faculty work, universities may have little chance of recruiting and retaining highly capable faculty who are willing to teach at a distance. Milem, Berger, and Dey (2000) find there is a large contradiction between what institutions say they value in regard to higher education and what they actually reward. Milem et al. further argue that although institutions state publicly that they "want to create educational environments that contribute to better outcomes for students," (p. 473), faculty are not rewarded in ways that promote better outcomes. Gappa, Austin and Trice (2007) assert that when a faculty member "is not respected or valued, or when his or her talents are not fully utilized, both the faculty member and his or her college or university loses" (p. 128).

But how integrated into the tradition of rewards such as promotion and tenure

practices is distance education? If distance education instruction does not count towards

promotion and tenure, why would junior[8] faculty seeking tenure want to, or be motivated

to instruct distance education courses? At many institutions in the U.S., tenured faculty

members are refusing to teach distance education courses, thus departments are either

utilizing adjunct faculty or faculty seeking tenure to fulfill distance education

instructional needs (Moore & Anderson, 2003). If institutional mission statements

actually convey a commitment to distance education offerings and providing this form of

instruction for its students, but then the institution lacks practices and/or policies for

rewarding distance education faculty, this may be problematic. In fact, the AAUP states

that rather than "demanding all things of all people," institutions "should define their

missions clearly and articulate appropriate and reasonable expectations against which

faculty will be judged" (p. 132).

Diamond (1999) maintains a mission statement provides a clear picture of what is

important to the institution, what it values, and a base in which schools, colleges and

departments can build as they develop their own mission and priority statements. These

statements also play a major role in communicating what an institution is to the outside

community, parents, and prospective students. It is an opportunity to include various

constituents as the institution formulates its unique characteristics and future goals.

Diamond asserts that institutional mission statements should be clear and concise, and

should identify the unique characteristics and priorities of the institution. In addition, he

believes the statements should be known and supported by the administrators, faculty and

[8] Faculty members seeking tenure are referred to as "junior" faculty throughout this paper because the
majority of distance education literature refers to faculty members at this level as junior.

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staff. Yet he claims that on many U.S. campuses, neither of these conditions is being

met. Rather, "a boilerplate approach to mission statements is often utilized instead of

identifying the particular strengths and priorities of the institution" (p. 51).

Distance education educates a range of students including (but not limited to),

full-time workers, rural citizens, stay-at-home mothers and fathers, and citizens who

cannot afford (or possibly want) to attend traditional programs. Due to its outreach

tradition, [9] distance education is closely aligned with, and a logical extension of a land

grant university's public service mission of educating all citizens (Tierney, 2001;

Wolcott, 2002). The mission statement of an institution is an expression of its purpose

and values. In theory, there should be a strong connection between these values and the

goals, priorities, and policies that derive from them (Wolcott, 2002). Therefore, the

closer the match between the mission of an institution and the priorities as described in

the reward system, the more useful the faculty may be in helping the institution reach the

goals that have been identified.

All too often what are articulated as the priorities of a university are not supported

by the faculty reward system (Diamond, 1999). For example, some institutions state in

their mission statements that they embrace technology-enhanced teaching and learning

(such as distance education) by offering it, yet they lack clear policies (or any policy) on

whether this instruction counts towards promotion and tenure. This lack of incentive can

result in reluctance by junior faculty to teach via distance. It can also decrease the ability

to attract quality junior faculty to the institution, and it can ultimately affect the quality of

the program if institutions lack the number of faculty needed to teach these courses. If

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[9] Outreach and the history of distance education are discussed in Chapter Two.

this is the case, distance education offerings may need to be reduced (Holmberg, 1994; Wolcott, 2002).

Concerns other than promotion and tenure can certainly influence junior faculty reluctance to teach courses via distance. These include lack of technological savvy, intellectual property concerns, and time issues as to training, just to name a few. These concerns, however, have been previously examined in the literature (Betts, 1998; Bower, 2001; Giannoni & Tesone, 2003; Passmore, 2000; Rockwell, Schauer, Fritz, & Marx, 1999; Schifter, 2000) and are not the focus of this particular study. For example, various studies have demonstrated that faculty members are concerned about adequate 1) training support (Feist, 2003; Rockwell et al., 1999); 2) technical support (Frith & Kee, 2003; Jennings & Bayless, 2003; Lan, Tallent-Runnels, Thomas, Fryer, & Cooper, 2003); and 3) course development assistance, and a system of evaluation and assessment of distance education and faculty (Gibson & Herrera, 1999; Zhang, 1998). Literature that connects faculty reward structures with performance is quite limited.

Purpose of the Study

The purpose of this dissertation research is to add to the research on distance education policy and the process of distance education policy development in higher education. Specifically, this study is designed to understand distance education policy from the perspective of the internal stakeholders -- administrators, faculty, and support staff. The research is directed at exploring how MSU translates its values regarding distance education into reward policy for junior faculty who teach via distance.

Contribution and Significance of the Study

The current growth in distance education occurs at a time when higher education

has already been engaged in examining the work of faculty. Over the past decade, there

has been widespread discussion about reforming the tenure system, what constitutes

scholarship, faculty outside the tenure system, and the changing demographics of faculty

members (Gappa, 2008; Schuster & Finkelstein, 2006). Together, these forces are

reshaping the role and expectations of faculty in higher education. To sustain distance

education and also allow for growth, administrators and policymakers should understand

the issues surrounding distance education instruction. St. John (2006) suggests,

"Qualitative studies of organizational adaptation to changes resulting from market forces

in higher education can help build an understanding of governance of finance" (p. 260).

Distance education policy is necessary to guide institutional programs and

practice in higher education (Nelson, 1999). Dirr (2003) believes there are many policy

issues concerning distance education that must be addressed over the next decade,

including reward for instruction. Therefore, this study is significant because additional

research is needed in the area of faculty instruction in distance education because the

majority of the distance education research that has been conducted thus far is about the

students, not the faculty. In a review of the major subjects addressed in a range of

distance education publications in the 1990s, Phipps and Merisotis (1999) found that

faculty issues received the sparsest coverage.

In addition, few policies currently exist that specifically address distance

education faculty issues, such as its place in promotion and tenure (Gappa, Austin, &

Trice, 2007; Olcott & Wright, 2002; Rhoads, 2005; Wolcott, 2003). With the quality of

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distance education continually being challenged by educators, administrators and policymakers, studies uncovering what factors influence reward practices are certainly warranted. Moreover, if distance education efforts at institutions across the nation are expected to be successful, close examination of policies affecting its faculty are needed. It is expected that the findings from this study will inform and improve policy development and practice.

The findings from this study can also help us understand how distance education is valued, and how it fits into the culture of institutional rewards at a land grant, degree-granting institution in the United States. In fact, the acceptance of distance education as legitimate education will not only depend on how it is designed and delivered, but also on how it is valued by the whole institution. In addition, a thorough examination of the literature produced no findings of a study that specifically examines the relationship between institutional values and reward structures for junior faculty teaching via distance. Therefore, it is expected that the study's contribution to the field will consist of a more conceptual understanding of the relationship between distance education and the institution.

Overview of Remaining Chapters

Chapter Two provides an historic overview of land grant colleges and universities in the United States, and a brief synopsis of promotion and tenure. In addition, a detailed discussion of the origin and history of distance education is presented, as are new modes of distance instruction. Several theoretical perspectives that were used in relation to distance education to help inform the study are introduced, and a discussion of previous

research on distance education and faculty reward is included as well. Lastly, the conceptual framework for the study concludes the chapter.

Chapter Three provides a detailed discussion of the methods employed for addressing the study's research question and sub-questions, including a rationale for choice of institution and choice of sampling. Administrators, faculty, and support staff at Michigan State University make up the sample for the study (n=29). A discussion of the data collection procedure for participant interviews and extant text analysis follows, and an explanation for the analysis of the data is offered. The remainder of the chapter points to the validity and reliability of the study, and includes a discussion of the ethical considerations and limitations of this study.

Chapters Four and Five present the results from the study and an interpretation of these findings. Core components of Chapter Six include the conclusions drawn from the major findings and analysis, the development of grounded theory, implications for policymaking and practice in regard to faculty reward for distance education efforts, and suggestions for areas of additional research.

CHAPTER TWO

REVIEW OF LITERATURE

A Brief Historical Overview of Land Grant Colleges and Universities in the U.S.

The European vision of scholarship was augmented in the U.S. by the passage of

the Morrill Land Grant Act during the Civil War. Justin Smith Morrill, a representative

and later a senator from Vermont, sponsored the land grant legislation that bears his name

and is generally credited as having secured its passage. Morrill first introduced a land

grant bill in Congress in 1857, which after much struggle was passed in 1859 only to be

vetoed by President James Buchanan. In 1861, Morrill introduced another land grant bill

that increased the grant to 30,000 acres for each senator and representative, and added a

requirement that recipient institutions teach military tactics. The newly felt need for

trained military officers to fight in the Civil War, along with the absence of Southern

legislators who had opposed the earlier bill, helped the Morrill Act through Congress in

just six months. President Abraham Lincoln signed it into law on July 2, 1862 (National

Association of State Universities and Land Grant Colleges, 1995).

This 1862 Morrill Act introduced the American concept of land grant colleges

that provide service to the nation and prepare students for leadership and participation in

a democratic society (Gappa, Austin, & Trice, 2007). This law gave states public lands --

provided the lands be sold or used for profit. The proceeds were to be used to establish at

least one college (hence, land grant colleges) that would teach agriculture and the

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mechanical arts (see Figure 2.1). Land grants for the establishments of these colleges were also later given to U.S. territories and the District of Columbia, and the legislative mandate for these colleges helped extend higher education to broad segments of the U.S. population (National Academy of Sciences, 1995). The Land Grant Acts of the mid- and late nineteenth century "epitomize the ethos public investment in higher education in the United States" (St. John, 2006, p. 249). St. John further states, "the intent of the land grant colleges related to the implied and measurable benefits of investment" (p. 250).

In the mid-1800s, farmers were becoming increasingly aware of a disparity – economically, socially and politically (as can be noted in addresses before state and local societies, in the discussions of farmers' clubs, and in letters and editorial comments in the agricultural press) (Ross, 1953). It was believed that education would hasten and facilitate the climbing of the agricultural ladder, which seemed to have security and permanence. Thus, ambitious, young men of humble beginnings aspired to leadership positions in agriculture, utilities, and the professions.

In order to make the new education appropriate and acceptable to an ever-widening constituency, drastic changes in content and method were demanded, particularly in preparation for, and adjustment to the new society and economy (Ross, 1953). Recognizing the need for research as a basis for developing agriculture, Congress passed the Hatch Act in 1887. This authorized federal funding for an agricultural experiment station in connection with each land grant institution. Although public universities already existed in some states, most states responded to the Morrill Act by legislating new agricultural and mechanical arts colleges rather than by endowing existing state institutions (Kerr, 1987). The problem is that the Act gave rise to a network

Figure 2.1   Map of U.S. Land Grant Colleges and Universities – 1862 and 1890
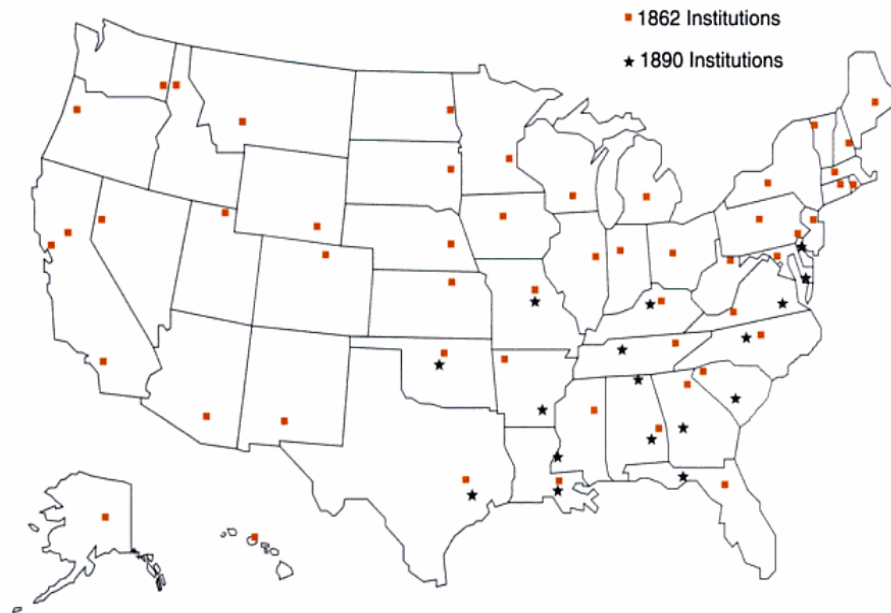
Map shows locations of the 1862 and 1890 land grant colleges and universities in the contiguous United States, Alaska, and Hawaii. Not shown are land grant locations at American Samoa, Guam, Micronesia, Northern Marianas, Puerto Rico, and St. Thomas in the U.S. Virgin Islands. Symbol placement indicates geographic location of each institution, showing physical proximity.

Source: National Academy of Sciences (1995). *Colleges of Agriculture at the Land Grant Universities: A Profile.* Author.

of often poorly financed colleges known as the "1862s." Therefore, the passage of the

Second Morrill Act of 1890 helped the situation by providing annual appropriations to

each state to support its land grant colleges. As the U.S. economy continued to grow and

change, most of the land grant colleges changed as well and were transformed into full-

fledged universities.

In the early 1900s, land grant colleges took on another function, called

"extension," which was designed to disseminate agricultural, college-generated

knowledge beyond the campus to farms and consumers. The 1914 Smith Lever Act

established extension[10] on a nationwide basis and stated it was to be a cooperative

activity between the federal government (through the United States Department of

Agriculture) and the states (through the land grant colleges). The federal mandate came

in response to concerns that information and technology being developed at the state

agricultural experiment stations and the United States Department of Agriculture were

not reaching many farmers, particularly those most in need of education (National

Academy of Sciences, 1995).

In more recent decades the land grant system expanded to accommodate

additional U.S. jurisdictions. The University of the District of Columbia, arguing that it

was the last substantial area in the nation without the services of a land grant college,

received land grant status and a $7.24 million endowment in lieu of a land grant in 1967.

Beginning in 1971 Guam, Micronesia, American Samoa, Northern Marianas, and the

Virgin Islands repeated the argument that these territories were the only areas under the

American flag that had not been allowed to participate in the land grant college program.

Their land grant status was approved in 1972 in a Special Education Amendment, with

each receiving a $3 million endowment instead of land. Currently, research and

extension funds are appropriated to these institutions on a similar basis as they are to

other land grant universities (National Association of State Universities and Land Grant

Colleges, 1995).

A nearly two-year campaign by the twenty-nine tribal colleges that comprise the

American Indian Higher Education Consortium (AIHEC) was brought to a successful

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[10] University "extension" will be discussed in detail in a future section of this chapter.

outcome in October 1994, when Congress passed legislation granting them land grant status. In November, the board of the National Association of State Universities and Land Grant Colleges (NASULGC), which had strongly endorsed the campaign, voted to admit AIHEC as a system member of the association with one representative as a member of NASULGC's Council of Presidents. In January 1995, AIHEC became the newest member of NASULGC, the nation's oldest higher education association. The bill also authorized a $23 million endowment for them to be built up over five years with the colleges receiving interest payments from the endowment each year. In addition, the legislation authorized a $1.7 million challenge grant program for higher education programs in agriculture and natural resources, much like the successful program at the 1890 colleges, and $50,000 per school for higher education in agriculture and natural resources (National Association of State Universities and Land Grant Colleges, 1995).

And although today some of these colleges and universities are still deeply connected to, and known for their agricultural college roots, others have little agricultural identity and students are rarely from farm families.

Brief Synopsis of Promotion and Tenure

With the passage of the 1890 Morrill Act, the number of college and university faculty members increased dramatically, subsequently dividing the professorial ranks into assistant, associate, and full, and codifying the procedures for advancement in rank and for the probationary period prior to advancement to tenure (O'Neil & White, as cited in Gappa, Austin, & Trice, 2007). Entry into the profession required a doctoral degree, and publication became the path to promotion for faculty. Although no single event brought

about the creation of the promotion and tenure system, Tierney and Bensimon (1996)

argue that it is generally agreed that it was developed as a way to guarantee academic

freedom.

In 1915, the American Association of University Professors (AAUP) was formed.

"With the endorsement by college presidents and learned societies of the AAUP's 1940

statement on principles of academic freedom and tenure, tenure became the model for

employment in the academic profession" (O'Neil & White, as cited in Gappa et al., 2007,

p. 53). The AAUP's 1940 statement on tenure includes the following:

> Tenure is a means to certain ends; specifically: (1) freedom of teaching
> and research and of extramural activities, and (2) a sufficient degree of
> economic security to make the profession attractive to men and women
> of ability. Freedom and economic security, hence, tenure, are indispensable
> to the success of an institution in fulfilling its obligations to its students and
> to society (1940 Statement of Principles on Academic Freedom and Tenure.
> Retrieved June 2, 2007, from http://www.aaup.org/AAUP/pubsres
> policydocs/1940statement.htm?wbc_purpose=Basic&WBCMODE=
> Presentation Unpublished).

Tenure defined a mutually beneficial, reciprocal relationship between colleges

and universities, and their faculty members. Tenured faculty members were guaranteed

job security, autonomy in the exercise of their responsibilities, and academic freedom at

their institutions. In exchange:

> Faculty members made long-term commitments to their institutions,
> used their intellectual capital for the benefit of their academic
> communities and society, and assumed responsibility for decision
> making in an environment of shared governance (Gappa et al.,
> 2007, p. 129-130).

Rice (1986) discusses the height of the mid-1960s as the "golden age for faculty"

when affluence and expansion in higher education (based on the context of the research

university) brought about a consensus of what it meant to be a professional academic:

♦ Research was the central professional endeavor and focus of
academic life.

♦ Quality in the profession was maintained by peer review and
professional autonomy.

♦ The pursuit of knowledge was understood to be best organized
by discipline within departments; professional rewards and mobility
accrued to those who persisted in their specializations.

♦ Reputations were established through national and international associations.

This consensus guided the careers of a new generation of faculty members hired

in the 1960s and 1970s (Gappa et al., 2007). By 1975, however, pressure on colleges and

universities led to new academic personnel policies and increased use in part-time

faculty. Salary cuts were seen in Massachusetts and California, and the spread of faculty

unionism led observers to question the need for tenure (Chait, 2002). Job security could

now be guaranteed by union contracts, and state and federal laws now ensured academic

freedom. In the beginning of the twenty-first century, roughly 25% of all institutions of

higher education have some faculty represented by a union, a group encompassing 26%

of full-time faculty and 20% of all part-time faculty (NCES, 2004).

In addition to the role of the candidate, there are typically four key actors

involved in the tenure process: 1) the department chair; 2) the dean and/or provost; 3) the

president and board of trustees; and 4) the external reviewers (Tierney & Bensimon,

1996). It is important to note, however, that institutions use vastly different processes in

their efforts to ensure tenure, and that there are an increasing number of non-tenure track

faculty being hired to work at these institutions (Baldwin & Chronister, 2001). The

Michigan State University policy declares that deans must take into account:

Table 2.1   **Tenure – What is Standard?**

All tenure-granting institutions	Almost all tenure-granting institutions	Most tenure-granting institutions
♦ Have probationary periods for junior faculty.	♦ Allow the dismissal of tenured faculty in the event of program discontinuance.	♦ Have a maximum probationary period of seven years.
♦ Define tenure similarly.	♦ Eschew tenure quotas.	♦ Follow AAUP guidelines for allowing credit toward tenure for prior teaching experience.
♦ Offer promotion in rank.		♦ Periodically review probationary faculty.
♦ Allow the dismissal of tenured faculty for "adequate cause" and financial exigency.		♦ Have fairly standard academic freedom clauses.
		♦ Link academic freedom and academic tenure in policy statements.

Source: Chait, R. P. (2002). *The questions of tenure*. Cambridge, MA and London: Harvard University Press.

> Unit, college, and University criteria and other factors such as quality, progress, resources, program needs, percent of tenured faculty in the unit, and any other relevant University policies and goals when making promotion decisions (Chait, 2002, p. 48).

In Table 2.1, Chait's (2002) findings are presented as to what is standard among the two hundred seventeen U.S. four-year institutions his team examined.

Tierney and Bensimon (1996) suggest, "Tenure is the strongest example of a socializing mechanism for new faculty in that it involves the exchange and definition of thought and action" (p. 36). They see organizational 'socialization' as a highly charged process through which different individuals and groups come together to determine organizational beliefs and attitudes. Thus, rather than treating tenure as an abstract

system for safeguarding conceivably outmoded concepts of academic freedom, Tierney and Bensimon suggest it needs to be thought of as a "cultural process that orients individuals and the organization to evolving institutional values and ideologies" (p. 37).

In summary, the academic profession is in the midst of a major transition. This change has consequences and implications for relationships between an institution and its faculty, and for faculty careers as well. As institutions hire more faculty members who are not on the traditional tenure track, they must carefully design policies and practices that will maintain educational quality without ignoring faculty members at all levels, including those who teach traditional and non-traditional courses.

Origin and History of Distance Education

Understanding the history behind distance education's evolution is critical for conducting modern studies that employ new conceptualizations like the one presented at the end of this chapter. Distance education actually owes its beginnings to non-traditional educational efforts that began in the nineteenth century. European influence contributed to these alternative forms of traditional instruction in America including lyceums, university extension and correspondence education. Education and training became important social concerns in the latter half of the nineteenth century (Holmberg, 1995), and all three of these forms of instruction had social, as well as some form of educational impact, but they also contributed to modern adult education in the United States. From historical records and analyses, it appears that visions of democratization (for increasing access to higher education by underserved populations) were present in

many of the germinal experiences in distance education (Larreamendy-Joerns &

Leinhardt, 2006).

The attractiveness of the lyceum at Chautauqua in the summer, the success and

failure of university extension efforts during the late nineteenth century, and the increase

of private correspondence schools in America all faced opposition, challenges, and a

degree of popularity as America's educational climate changed.

This section will provide an overview of the evolution of these three non-

traditional forms of education and demonstrate how they contributed to the notion of

distance education that emerged in the 1970s.

Defining the terms

It is first necessary to define lyceum, university extension and correspondence

education, especially because the terms university extension and correspondence

education are often used interchangeably in the literature that discusses these alternative

approaches to traditional education, yet they are not the same form of instruction. The

first widespread movement of schooling for adults in America was the lyceum, defined as

"An institution through which lectures, dramatic performances, debates, and the like are

presented to a community" (Bode, 1956, p. x). This form of instruction was imported

from England during the Jacksonian era (Woytanowitz, 1974). Kett (1994) reports that

Josiah Holbrook devised the first scheme for American lyceums in 1826, which were

"local literary and scientific associations of adults for mutual improvement" (p. 38). He

further states, "Although lyceums did not develop along the lines Holbrook envisioned, in

the form of organizations for sponsoring popular lectures they became a vast enterprise between 1830 and 1860" (p. 38). Bode (1956) states:

> More than once in the early years of the lyceum system the word was defined apologetically or even irritably. One reason for its adoption was suggested by the *Columbian Centinel* in 1828, which pointed out the advantage of the fact that it was confined to no particular class (xii).

University extension is harder to define because of the diversity of forms that the movement took. In the Report of the First International Conference on Correspondence Education (1938), university extension is expressed as "a system of class instruction beyond college walls" (p. 79), where professors provided lectures off-campus for the uplift of society.

University extension provided lectures that were systematic and sequential, something the lyceums did not offer. Looking at the origins of university extension further on in this section, and its connection to correspondence education will help provide a better understanding of various extension forms and how they are inseparable from the Chautauqua Movement and the success of British universities in planting the field of extension lectures during the 1870s and 1880s (Kett, 1994).

Correspondence education is taken to denote teaching in writing, by means of so-called self-instructional texts, combined with communication in writing, (i.e., correspondence between students and tutors or professors usually via mail). Teaching and learning by correspondence is the origin of what is today called distance education (Holmberg, 1995).

The Lyceum Movement

The main purpose of the first movement, the lyceum, was originally to provide practical scientific instruction for workmen and to produce more intelligent workers (Bode, 1956).   It evolved into becoming popular lectures that were given to disseminate practical information, upgrade social morality, educate the expanding electorate, and improve the common schools, all at a minimum expense. When Timothy Claxton, an English mechanic, moved to Boston, Massachusetts in 1826, he was surprised to find that no mechanics' institutes existed in the United States. He decided to create the first society in Boston that introduced popular lectures on various branches of science. The Boston Lyceum was organized in the summer of 1829 and engaged in self-help education, with the members giving lectures, exchanging books, and building a library (Watkinson, 1990).

Although Claxton was the founder of the Boston Lyceum, Josiah Holbrook is considered to be the leader in the American lyceum movement (Woytanowitz, 1974; Bode, 1956). Holbrook was a graduate of Yale and Claxton's associate in the Boston Mechanics' Lyceum (Watkinson, 1990). Holbrook initially became acquainted with the lecture work of Dr. Birkbeck from Glasgow, Scotland and subsequently helped develop American lyceums conformed to the British pattern. The main purpose of the movements in Britain and America were originally to provide practical scientific instruction for workmen and to produce more intelligent workers (Bode, 1956).[11] Birkbeck developed lectures mainly because he grew tired of having to supervise the manufacturers of his science instruments. This practicality was further demonstrated by one of Birbeck's

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[11] Carl Bode provides the most comprehensive history of the American lyceum movement and is cited more often than any other author in the literature on the lyceum. Most of the literature that exists on this topic comes from primary source documents that are diaries of men involved in the movement.

classmates, Lord Brougham, when he published a speech entitled "Practical Observations upon the Education of the People" with the hopes of attracting workmen to enroll at Birkbeck's London institution (Bode, 1956). Holbrook, upon becoming familiar with Birkbeck and Brougham's efforts in the mechanics movement issued his own lyceum manifesto in 1826 (Woytanowitz, 1974).

Holbrook's blueprint was for lyceums to stretch from town to county throughout the nation, disseminating practical information, upgrading social morality, educating the expanding electorate, and improving the common schools, all at a minimum expense. In 1829, Holbrook revised his manifesto to include improvement of conversation, propagation of libraries, an increase of academies, a compilation of town histories, a completion of agricultural and geological surveys, and a collection of mineral samples (Woytanowitz, 1974).

At the time, knowledge acquisition was greatly contributing to changes in voting rights. By 1828, four of the northeastern states had thrown out property qualifications for voting as the public argued that as long as it was only the people with property who were allowed to vote, surely the public schools would suffer. As the second quarter of the nineteenth century opened, the mechanic, the clerk, and the hired man looked upon the lyceum as the catalyst for marching triumphantly into polling places that had always been barred before (Noffsinger, as cited in Holmberg, 2002; Bode, 1956).

Throughout the 1820s and into the 1830s, towns in New England, the Middle Atlantic States, and westward were either emerging or increasing in size because of immigration. Bode (1956) suggests, "The larger the number of towns, the higher the percentage of children in school – that was the way it generally worked out" (p. 29).

Thus, factors that were helping public schools were also helping the lyceum because free education was its main goal.

Since the lyceum taught practicality, which would result in better workmen, it did not threaten the higher economic groups in the way a political forum would have. And, as the lyceum programs changed to include courses of lectures on history, foreign affairs, the art of living, etc., the audience also changed because of demand (Bode, 1956). This was a time when Americans were striving for culture. Lyceum lectures were a popular medium for informing the public and generating discussion about issues of the day. Not only were lyceums an alternative venue for professors to share their knowledge, they also provided a platform for statesmen, theologians, politicians, authors, and poets (Schultz, 2002). Ultimately, the lyceum movement progressed differently than what Holbrook had initially envisioned because a hierarchy of lyceums never emerged; rather, local groups flourished more.

A key strength of the lyceum was that it provided an opportunity for individuals who preferred to listen rather than read with an opportunity to keep up with current events. The lyceum provided a space where individuals were supposed to be free from intentional political or religious discussions because both were banned from the lyceum, yet indirect discussions on these topics arose because both politics and religion were unwittingly causing problems for public education. Ministers and politicians were also offering space for the lyceum at no cost with likely ulterior motives to benefit their cause.

From the period of 1828 to 1840, the lyceum was a socially approved institution (Bode, 1956). Bode states, "As a man went up the social scale [*sic*] the concept of improvement widened; general and cultural information began to assume a more

important place" (p. 32). It did not matter what social level someone achieved; the local lyceum appeared to offer something for the betterment of all of its members. As individuals saw others benefit from the lyceum, they too wanted social gain.

During the Jacksonian era, public and civic services increased and humanitarian forces grew including prison reform, temperance, women's rights, free education, trade unionism, abolitionism, and better care for the insane (Bode, 1956). The lyceum movement fit well with these causes because its initial goals included the upgrade of social morality, which encompasses many of these forces, and it aimed for improving common schools with minimum expense. Perhaps the most appealing aspect of the lyceum was the fact that no taxes were required to support it and if one did not attend the lyceum, one did not have to pay for it (Woytanowitz, 1974).

Some of the groundwork that had been laid for the public library movement was a result of the American lyceum system. The lyceum produced a thirst for knowledge that public libraries could satisfy. Although authorities quarrel about the exact extent of the lyceum's importance, a core agreement can be found that it was what brought the masses into new fields of thought (Bode, 1956).

Lyceum fever swept the country in the 1830s, much like university extension would sixty years later, but its character changed in the 1840s. It grew more commercial as agents arranged travel schedules for lecturers and it became more entertainment and lost much of its educational value by 1865 (Woytanowitz, 1974). A crusading anti-slavery journalist, James Redpath, traveled throughout the south interviewing slaves and reporting their commitments in dispatches to Horace Greeley's *New York Tribune*. Redpath soon realized he could capitalize on his emerging public persona by launching a

lecture bureau in 1868. He was successful in attracting prominent lecturers such as Mark Twain, Josh Billings, and Henry Ward Beecher as clients (Schultz, 2002). In 1901, Keith Vawter, one of Redpath's colleagues in the lyceum management business came up with a concept of a circuit of traveling tents that moved from town to town offering the same quality of lectures and forms of entertainment available through the lyceum. What these traveling tents were offering, however, was mainstream entertainment rather than education, which was more prevalent in Holbrook's initial manifesto.

Vawter named his traveling circuits "chautauquas," modeling them after the Chautauqua Institution in New York (Schultz, 2002). This establishment had become a popular attraction to middle-class workers and their families during the summer months beginning in the late 1870s because of its rich offerings of lectures, seminars, and workshops on economic and social issues, theology, literature, science, and the arts (Woytanowitz, 1974). Vawter's idea of chautauquas in the early twentieth century was demonstrative of the public's increasing appetite for lectures and entertainment, including musicals and theater. Vawter's success naturally attracted other entrepreneurs into circuit life and contributed to the demise of the traditional lyceums that had emerged in the nineteenth century.

In addition, the end of the lyceum movement appears to have occurred because its goals of freedom and civil rights for all were achieved by the Civil War, therefore, making its continued existence unnecessary. Thus, political, demographic, economic, social, psychological and cultural factors were all directly or indirectly related to the progression and ultimate defeat of the lyceum movement.

The initial success of university extension in Britain influenced American efforts in the nineteenth century. The Oxford Movement in university extension set about the deliberate task of extending the university's intellectual influence and teaching to the industrial and commercial centers of England, and thus beyond the social classes from which their colleges then took most of their recruits (Bell & Tight, 1993). Bell and Tight suggest, "Perhaps the main achievement of the extension movement in Britain was that it successfully conjured up the vision of an ever more open system of higher education" (p. 20).

The actual "movement" for university extension in America occurred in the latter part of the 1880s (Kett, 1994). The expectations of the founders (professors) of the American movement were to provide universities with access to the working class and to bring their personal influence to bear on the gap between the social classes, much like what Josiah Holbrook envisioned when he developed his lyceum manifesto. This social motive, however, virtually disappeared after 1895, but still existed at a few institutions like Johns Hopkins in the 1890s (Kett, 1994). It was seen by some as a way for the educated to focus their energies on social issues by lecturing.

Johns Hopkins University in Baltimore was interested in training workers. Their president, Daniel Coit Gilman and fellow professors provided lectures to workmen, which soon led to the establishment of a library and reading room (Woytanowitz, 1974). Woytanowitz further states, "Though the work was never called university extension, the spirit behind the effort was similar to that which led to true university extension" (p. 21). The underlying motives of the faculty, however, seemed to be for encouraging attendance

by the workers so the city could thrive and the workers could be kept busy so they stayed out of trouble.

Chautauqua was second to enter the extension field (Woytanowitz, 1974). During the 1880s, prominent academic figures such as Richard T. Ely and Herbert Baxter Adams developed close ties with the Chautauqua movement. Lecture series were first developed on announced topics, with formal syllabi, discussion, and the writing of essays and examinations (Kett, 1994). Although Chautauqua was originally opened under the guise of a Sunday school in a beautiful area, the force behind it was a man who gave a religious aura to even the most secular of subject matter. Bishop John H. Vincent presented a proposition that provided an easily understandable justification for reading and study. He postulated that it was almost sinful not to continue one's education throughout life (Woytanowitz, 1974). The result was the Chautauqua Literary and Scientific Circle, which engaged in a four-year reading program that consisted of devoting a year each to Greek, Roman, American, and English culture (Morrison, 1974).

At the same time, Chautauqua also offered correspondence education in theology (Woytanowitz, 1974). This type of education could be marketed as critical because reading the Bible was considered by many necessary for salvation. It could also appeal to the parents of young men who were fearful their sons would entertain ideas of education that did not involve religion. Even if living in rural areas, young men could take advantage of this form of education and earn an accredited bachelor of divinity degree from Chautauqua. Chautauqua's success was achieved through an appeal to both the love of learning and a sense of piety.

Woytanowitz (1974) and Morrison (1974) argue that Chautauqua's lecture efforts were a distinct improvement over the lyceum. They may be correct in their argument because lyceums were only blessed some of the time with prominent, educated speakers whereas Chautauqua continuously employed qualified university faculty, including William Rainey Harper who would lead the University of Chicago in 1892 (Kett, 1994). It is further argued that Chautauqua's curriculum was sequentially arranged and did not have a primary purpose of entertainment much like the lyceums did (Woytanowitz, 1974). Because Chautauqua had few pretensions about providing advanced scholarship, institutions that were interested in becoming premiere research and advanced scholarship entities were not concerned with what they believed to be the mediocrity associated with Chautauqua education. Harper and others enjoyed the fair surroundings of the lake and would often journey to the summer meetings as members of the faculty or as mere observers, but as institutions developed their own summer programs, the trips became less frequent (Morrison, 1974), thus reducing the number of prominent lecturers.

Chautauqua's extension program was never *very* successful, however, and its decrease in popularity among the masses may have been due to the waning number of prominent visiting professors. Woytanowitz (1974) argues it was not successful because "it was only one department in a vast adult education apparatus and did not fit in well with the other agencies" (p. 28). This did not stop other efforts in the direction of university extension in New York and other parts of the country, however. In 1888, The University and School Extension Society appeared with a formidable list of backers. This society provided training for teachers via homestudy, class work, lectures, traveling

libraries, and examinations (Woytanowitz, 1974). Legislative support for university

extension was actually enacted in 1891.

Practical training and cultural growth were both consistent themes throughout the

university movement in America. In the 1890s, as previously mentioned, several

universities began to take interest in university extension. William Rainey Harper led

Chicago to establish an extension division that offered both lecture and correspondence

courses (Kett, 1994). Richard Ely, inspired by his experience at Chautauqua, agreed to

direct Wisconsin's extension activities in return for a free hand in shaping the

university's projected departments of civics, sociology, and historical science (Kett,

1994). Veysey (1965) states:

> The Wisconsin Idea had two concrete elements: the entry of the
> expert into government, both in technical and in social planning,
> and, secondly, the extension movement, whereby university classes
> were held in every part of the state (p. 108).

President Ely, therefore, had the extension curriculum considerably expanded during the

Progressive period in an effort to extend the influence and the popularity of the university

into communities beyond the immediate vicinity of the institution (Rudolph, 1990).

In the 1890s, Philadelphia actually became the site of the largest independent

extension society in the world (Verduin & Clark, 1991). It appears it succeeded because

of support from many neighboring colleges and universities, and because it was the site

where Benjamin Franklin had developed a reading society for mechanics and tradesmen,

an effort that embedded the importance of adult education in the community. The

Philadelphia Society became the first chapter of a new organization known as the

American Society for the Extension of University Teaching (American Society) (Verduin

& Clark, 1991). Although extension efforts were expanding to the West, they were so

diversified throughout the nation society members had difficulty providing a set of norms for university extension. This prohibited the American Society from governing extension efforts throughout the United States.

Wisconsin saw no reason to affiliate with the American Society because they had already independently established their own system of university extension. The University of Chicago felt the same (Woytanowitz, 1974). The cooperation or lack thereof between the American Society and these two universities is interesting because they were competing with each other for prominent lecturers, and at the same time they were offering an alternative form of education that might have gained more strength had they combined forces.

The years between 1892 and 1899 marked the high point of the first wave of American extension activity, known as the "seven fat years" (Woytanowitz, 1974). Not only had university extension been established in the East and the Midwest, it also had gained a level of acceptance among kindergarten and graduate schools (Verduin & Clark, 1991). Woytanowitz (1974) reports that the attacks on extension ceased sometime after 1894, but has no real explanation as to why this occurred. Likely, individuals opposed to university extension may have realized they could not stop the movement because it was expanding and gaining in popularity. They also likely believed it was a "fad" and would soon cease to exist because of its own doing, and they possibly feared the competition that extension created for traditional education.

The American Society for the Extension of University Teaching became the principal force behind university extension in the 1890s through its incidental papers, syllabi and handbooks, journal, sponsorship of a national conference, and actual

coursework in the Philadelphia area (Woytanowitz, 1974). The University of Chicago and the University of Wisconsin both continued to be very competitive with the American Society in course and lecture offerings. But all would face new challenges as the decade came to a close and visiting lecturers began to search for stable university chair positions as their interest in extension work waned.

Although courses, lectures and students were an important aspect of the university extension system, so was bureaucracy. Officers, board of directors, and university professors set policies, served as spokesmen, and contributed to financial management of the programs. The successes and failures of extension efforts were being watched closely by these bureaucrats, but were also being watched by bureaucrats in Washington. For example, problems associated with the development of general university extension at land grant colleges existed, and although several land grant institutions at the turn of the century had succeeded in "providing some life opportunity for people to secure aid in their problems of learning in agriculture and home economics through the Smith-Lever extension service" (Tyler, 1961, p. 1), these efforts had only just begun and were quite narrow in their offerings.

University extension was revived in America after 1905; however, extension no longer:

> Stressed the diffusion of culture through popular instruction in academic
> subjects like history, literature, economics, and the natural sciences.
> Rather, vocational courses and a variety of activities that answered to
> the name of "public service" thrust their way toward the center of
> extension offerings (Kett, 1994, p. 187).

In the early 20th century, many professors no longer depended on additional extension work for supplementary income because institutions were enrolling a higher

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numbers of students, thus producing adequate salaries for them without the demand of travel.

By 1919, local extension efforts in Philadelphia slowly changed in character, and with a deterioration of extension periodicals produced by the American Society, the movement had lost its public voice, its means of advertising, and its basic channel of communication with society (Woytanowitz, 1974). The decline of the extension division of the University of Chicago was occurring at the same time as the American Society's decline, but with one main difference – correspondence study was surviving and would continue until 1964 at the University.

Correspondence Education

Correspondence education in the United States also owes its beginnings to efforts in England and Germany. Isaac Pitman, a professional phonographer from Bath, England, is generally recognized to be the first modern correspondence educator. He began teaching shorthand correspondence by mail in 1840, where students were instructed to copy brief Bible passages in shorthand and then return them to Pitman for grading, using the new penny post system (Holmberg, 1995; Dinsdale, 1953). Noffsinger (as cited in Holmberg, 2002) reports that Charles Toussaint and Gustav Langenscheidt formed and organized language teaching in Berlin by correspondence in 1856.

In the United States in 1873, Anna Ticknor (wife of George Ticknor, the first professor of modern languages at Harvard College) created a society to encourage studies at home for the purpose of educational opportunities for women of all classes in a society. Born Anna Eliot Ticknor, she became known as the "mother" of American

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correspondence and the founder of the Society to Encourage Study at Home (Holmberg, 2002). This Boston-based, largely volunteer effort provided correspondence instruction to 10,000 members over a 24-year period despite its resolutely low profile. Printed materials sent through the mail were the main way of communication, teaching, and learning (Nasseh, 2001). Holmberg (2002) reports:

> The idea of exchanging letters between teachers and student originated with her and monthly correspondence with guided readings and frequent tests formed a vital part of the organization's personalized instruction (p. 8).

The demise of Anna Ticknor's homestudy program is attributed to her death in 1897 (MacKenzie, Christensen, & Rigby, 1967). At the same time that Ticknor was creating her homestudy program, however, Wesleyan University in Bloomington, Illinois began offering non-resident instruction to prepare students for University examinations (Holmberg, 1995). Bittner and Mallory (as cited in MacKenzie et al., 1967) state that the teaching for work done at home was thorough and systematic. Approximately forty courses were required for a degree, half of which were electives. But even though Wesleyan's administration sanctioned equivalent standards and requirements for resident and non-resident students, controversy developed regarding the external program.

During the last decade of its existence, the non-resident program was criticized by University faculty, the Board of Trustees and some educators throughout the nation (Holmberg, 1995; MacKenzie et al., 1967). In 1906, the University Senate of the Methodist Institutions in Illinois decreed "that all colleges in the federation had four years in which to phase out their correspondence programs" (MacKenzie et al., 1967, p. 3). Wesleyan closed its doors shortly after that and critics of this action attribute the failure of other institutions in creating proper extension efforts as part of the reason it

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closed (MacKenzie et al., 1967). But at that time, Anna Ticknor's program was the only

successful correspondence effort that is documented (Holmberg, 1995), and hers was not

nationally marketed. In 1892, Pennsylvania State University also developed a program of

correspondence education that took advantage of the Rural Free Delivery, the 19th

century's version of the information highway where courses and agricultural knowledge

were taught to rural families via mail (Pennsylvania State University Webpage on

Distance Education, n.d.).

     Dr. William Rainey Harper, a frequent visitor and participant at Chautauqua

during the summer, opened five new divisions at the University of Chicago in 1892

(MacKenzie, Christensen, & Rigby, 1967). One of these divisions was the University

Extension Division, which included correspondence teaching as part of its offerings. The

correspondence program offered was thoroughly integrated with the regular curricula,

including courses, instruction, examinations and degree credit. Within a few years,

Harper's instructional innovation had spread to other institutions. Although the

Correspondence Teaching Department at the University of Chicago expanded over a

period of seventy-two years, it was terminated in 1964 (Holmberg, 1995; MacKenzie et

al., 1967; Keegan, 1993), but its influence continues on today in the form of modern

distance education efforts previously discussed including synchronous and asynchronous

instruction, videoconferencing, coursework and degrees completed via mail, and other

various technological methods for non-traditional education.

     During the first several decades of the 20th century, correspondence education

found an important place in which to function in the form of homestudy courses for

adults engaged in industry and in the most diversified occupations. As Keegan (1996)

states, "All forms of human life have been heavily influenced by the Industrial

Revolution" (p. 78), and correspondence education was no exception. It was anticipated

that various groups could be assisted through rigorous correspondence instruction

including those engaged in professional studies, graduates of colleges engaged in

advanced studies, tutors and young teachers in schools, academies and colleges, officers

and men in the Army and Navy, workers in shops and on farms who could not leave their

daily work to attend school or college, and persons who merely wished to pursue study at

home (MacKenzie et al., 1967). Correspondence education and the Industrial Revolution

began about the same time because they were integrally linked. Packing companies,

railroads, the American Banking Association, labor unions, the Army and Navy, and state

and national welfare associations recognized the flexibility and merits of correspondence

education (Watkins, 1991). In response to wartime needs, correspondence study

programs and university extension programs provided a variety of technical and

mechanical training opportunities, as well as short courses and refresher courses for

Army and Navy personnel (Watkins, 1991).

During this time, many leaders in the movement of correspondence education saw

the need to bring together educators and administrators from different countries who

supported this movement. This resulted in the first international conference on

correspondence education, which was held in Victoria, British Columbia in August of

1938 (Report of the First International Conference on Correspondence Education, 1938).

Representative of the times, educators of both sexes were present for this first conference

since women's roles in education were increasing.

As the need for more educated citizens became apparent, these various leaders in education felt the need to gather and take stock of their ideas on how to improve and expand this ideal of equality of educational opportunity. As the chairman at the first conference stated, "By equality of educational opportunity we mean extending education of equal quality to every one, [*sic*] no matter where he may live, and no matter what his reasonable aspirations may be" (Report of the First International Conference on Correspondence Education, 1938, p. 10).

The goals of the conference were: 1) to afford an exchange of experiences and an examination of widely different points of view; 2) to evaluate results already achieved in correspondence education; 3) to consider how to solve difficult problems already identified with this type of study; 4) to examine different techniques and a possible standardization of the most approved procedures in the preparation and administration of such courses; and 5) to determine which policies would make the most effective utilization of the correspondence method of instruction (Report of the First International Conference on Correspondence Education, 1938). Being the first conference on correspondence education, one of the primary (though not officially listed) goals of the conference was to attract membership and future attendance for the continuation of the conference. By 1964, a total of sixty-one universities and colleges were all members of the National University Extension Association and all had established correspondence programs (MacKenzie, 1967).

In the mid 1960s, the development of the Correspondence Education Research Project was a major hope for more research activities associated with correspondence study in American higher education. In addition, the founding of the British Open

University in 1969 marked the beginning of a period in which degree-giving, distance-teaching universities with full degree programs, sophisticated courses, new media and systematic systems of evaluation cropped up in various parts of the world and conferred a certain prestige on education at a distance (Holmberg, 1995). Britain's Open University (OU) became the first single-mode institution to cater to *only* distance education students. Born in the "White Heat of Technology" era, the OU was founded on the belief that communications technology could bring high quality, degree-level learning to people who had not had the opportunity to attend campus universities (Open University, 2007). By 1980, total student numbers had reached 70,000, and some 6,000 people were graduating each year. As the importance of career development grew, the University began to offer professional training programs alongside its academic programs. New methods of learning were implemented with the rapid growth in the use of computers; the 1990s brought e-learning methods to OU and were incorporated into most of the university's courses.

John Daniel, Vice Chancellor of OU in 1998, claims that the basic economic approach of distance education is to replace labor with capital, or to replace variable costs with fixed costs. He proposes that the per-unit cost of teaching can be cut either by adding more students to existing courses, or by making instruction more efficient. According to OU today, it has been faithful to its mission of openness to methods. Over three decades, OU has adopted various new media types for teaching and learning (Open University, 2007).

The 1970s and 1980s introduced America to the concept "distance education," and cable and satellite television came into use as a delivery medium for distance

education courses (Nasseh, 2001). Thus, distance education at the beginning of the twenty-first century is a product of an evolutionary development rooted in early attempts to teach and learn by public lectures, extension and correspondence efforts.

In summary, if one reviews the history of the lyceum, university extension, and correspondence education, it appears obvious that these types of instruction were not meant to replace traditional education. Rather, they were modeled after British efforts so they could be utilized for social reasons, for the training of workers and farmers, and to provide education for individuals in communities beyond the vicinity of the traditional institutions. Distance education is for many people the only route to postsecondary education, and in many instances, individuals continue to be geographically separated from any university resources at all, while others may require highly specialized education that can be obtained only from an institution hundreds or thousands of miles away. Others prefer to study on their own through a distance education offering despite the unusual discipline that such an activity may demand. Although the lyceum and university extension were not able to survive, their impact on modern adult education cannot be dismissed. They emphasized education for the masses and this can be seen in the vast distance education offerings that currently exist throughout the world.

Correspondence education not only brought practical vocational and professional development education to individuals, but also gained the interest and investment from many private companies looking to capitalize on the attractiveness of non-traditional forms of instruction. Its evolvement to what is known today as distance education is due to the rapid technological developments that allowed correspondence education to expand beyond its initial means of communication. What appears to be certain is a clear vision

of the future that includes many distance education offerings and its continuing evolvement to achieve its goals.

New Modes of Distance Education

Van Dusen (2002) reports, "Depending on the needs of the individual and the resources of the institution, at least eight new learning environments, pioneered by distance learning practitioners, are available on U.S. college and university campuses" (p. 242). These include: 1) one-way audio/visual classrooms where picture and sound are transmitted from a studio location to a classroom on campus or a remote site, such as home or office; 2) two-way audio/visual classrooms known as Interactive Television where physical classrooms on the same or different campuses are technologically linked for real-time learner-instructor and learner-learner interaction; 3) two-way audio classrooms consisting of instruction without the video component, but rather instituted by telephone; 4) two-way audio graphic classrooms similar to two-way audio, but with the visualization of materials through the use of two telephone lines; 5) desktop groupware conferencing which allows the instructor and student to be linked by personal computer using phone or Internet connections whereas the sessions can be synchronous or asynchronous; 6) desktop video conferencing which offers more advanced computer-mediated conferencing by offering real-time or asynchronous video recording; 7) asynchronous desktop conferencing which permits fax storage and retrieval and, in some cases, voice-mail services; and finally, 8) asynchronous/CD-ROM hybrids which create multimedia learning opportunities for students with appropriate computer peripherals (Van Dusen, 2002).

In addition, some institutions are utilizing podcasting in conjunction with distance education efforts in order to deliver lecture content via alternative means. Michigan State University, for example, had ten courses available via podcasting for Fall 2008. As part of MSU's "University Podcasting Project," these courses can be distributed via audio and video files over the internet for use on mobile devices and personal computers. Files can be automatically delivered by way of a subscription feed, and file formats are as follows: PDF, ACC, MP3, MP4, WAV, JPEG, GIF, TIFF, and PNG (See *http://www.podcast. msu.edu.*). To address the growing use of, and interest in distance education, web-conferencing tools such as Breeze, WebEx, Skype, and Yugma (just to name a few) are increasingly being showcased as non-traditional delivery formats at educational conferences worldwide (Web Conferencing as a Delivery Method, 2008).

Whatever the mode, learners should experience facile and convenient interaction (McIsaac & Gunawardena, 2001; Moore, 2007; Schwitzer, Ancis & Brown, 2001).

Theoretical Perspectives

Although various forms of distance education have existed since the 1800s, and attempts at theoretical explanations of distance education have been undertaken for decades by leading scholars in the field, the need for distance education theory has been largely unfulfilled until fairly recently. As early as 1973, Moore expressed concern about the progress of distance education. He indicated that there was a need to describe and define the field, a need to discriminate between its various components, and a need to identify the critical elements of distance teaching and learning.

Over the last two decades, several theoretical frameworks derived from general education theories have been proposed that seek to encompass the whole of activity in distance education (Holmberg, 1995; Keegan, 1986; Moore, 1991; Peters, 1989; Verduin & Clark, 1991). Yet, all of these theories focus on learning and the learner-teacher relationship rather than on institutional support and reward for distance education faculty. Theoretical perspectives focusing on faculty reward for this type of instruction (Diamond, 1999; Dillon & Walsh, 1992; Olcott & Wright, 1995; Wolcott, 2002) have only recently emerged in the literature. Diamond (1999) theorizes that faculty rewards need to be strongly aligned with an institution's mission, whereas Wolcott (2002) goes a step further by theorizing the importance of this connection in distance education. Olcott and Wright (1995) provide the missing framework needed for Dillon and Walsh's (1992) research by emphasizing a central leadership role for faculty who teach via distance.

Slaughter and Rhoades (2004) developed a theory of academic capitalism based on their analysis of the relations between higher education and society at the turn of the twenty-first century. Their theory of academic capitalism in the new economy "sees groups of actors within colleges and universities – faculty, students, administrators, and managerial professionals" (p. 306) as creators of new circuits of knowledge that link the university to, and bring it into the new economy.

Therefore, these theories are used in relation to distance education instruction to help inform the study.

a. Dillon & Walsh's Work (1992)

Works by Dillon and Walsh (1992) and Olcott and Wright (1995) have set the stage for studying faculty issues in distance education, including reward structures. Dillon and Walsh's (1992) literature review stands as a seminal work concerning research about faculty issues in distance education (Wolcott, 1997). Examined from the perspective of Rogers' (1983) theory of innovation[12] and in the context of faculty development, their analysis of research yields five sets of issues: 1) faculty characteristics; 2) rewards and incentives; 3) leadership; 4) linkage and observability; and 5) ownership, compatibility, and openness. Their review of 24 studies includes findings relating to participation, faculty motivation, and institutional incentives. They conclude that institutions lack commitment to and support for distance education, intrinsic factors (such as prestige and self esteem) motivate faculty to teach at a distance, and faculty perceive that distance teaching is not rewarded. Overall, Dillon & Walsh fault the literature at that time for its lack of quantity and quality, and of the 225 distance education articles that they examined, only 24 are actually related to faculty.

But it is important to note here that institutions of higher education were trying to adapt to the rapid technological changes that were occurring in the 1980s. With the implementation of the Internet not occurring until 1990, relatively few distance education faculty and distance education offerings existed for researchers to study at that time. That is beginning to change, as the literature demonstrates. Wolcott (2003) finds that empirical studies relating to faculty participation have increased, as evidenced by a flurry

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[12] Rogers' theory of innovation is discussed in detail further on in this section.

of research activity in the late 1990s.[13] Thus, Dillon and Walsh (1992) were correct in

faulting the literature at the time of their review for failing to:

> View faculty development within the framework of a system which
> supports both professional development (i.e., faculty development)
> and organizational development (i.e., improving the institutional
> environment for teaching and decision making) (Dillon & Walsh,
> 1992, p. 281).

Nevertheless, despite the shortcomings they point out, the research they cite did

lay the foundation for further inquiry.

b. Olcott & Wright's Theoretical Framework (1995)

Olcott and Wright (1995) proposed the missing framework needed. They

conceptualized faculty involvement in distance education from an institutional

perspective and offer an expanded view of participation that places faculty at the center

(see Figure 2.2). Designed to increase participation, the framework emphasizes a central

leadership role for faculty as the critical human resource in the success of distance

education, and emphasizes administrative commitment and support as key factors in

decreasing faculty resistance and institutional barriers to participation. Incentives,

financial support, rewards, resources, policies, and institutional commitment are factors

that figure prominently in the support framework. At the core of their model, four

concentric rings surround the faculty and depict the infrastructure required for developing

a supportive institutional environment.

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[13] See my reference list for further proof of this.

Figure 2.2   **Olcott and Wright's Faculty Support Model**
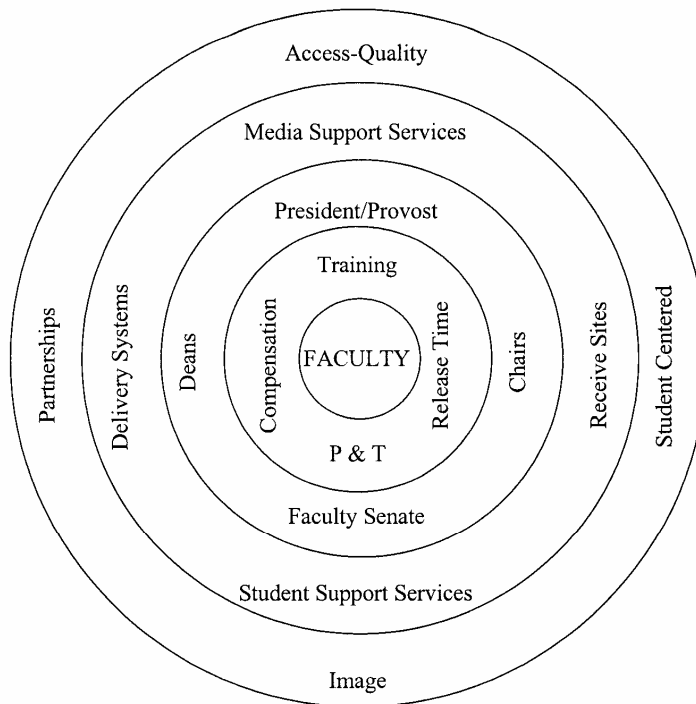
Source: Olcott, D., & Wright, S. J. (1995). An institutional support framework for increasing faculty participation in postsecondary distance education. *American Journal of Distance Education, 9(3),* (p. 10).

From an instructional perspective, Olcott and Wright believe the framework can be viewed as a faculty-centered instructional system as opposed to a student-centered learning system. They emphasize that the administrative support service framework provides the infrastructure from which faculty can adapt to the diverse learning needs of students and deliver technology-based instruction that is truly learner centered. According to Olcott and Wright, the first concentric ring consists of immediate faculty concerns including compensation, training, release time, and promotion and tenure applicability. The second concentric ring – indicating the president, provost, deans,

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departmental chairpersons, and faculty senate – emphasizes administrators' importance in addressing common compensation issues and in setting the climate for the academic culture's receptivity to distance education across the institution. Olcott and Wright assert that the administrators' position in concentric ring two, which is adjacent to the inner circle of faculty and faculty issues, accentuates administrators' critical role in resolving these issues and serving as advocates for their faculty.

Similar to traditional instruction, presidents, vice-presidents, and provosts control resources and establish policies that affect the perceived importance of distance education. Deans and departmental chairpersons allocate resources, schedule and approve teaching assignments (both inload/regular load and overload),[14] and informally determine which academic activities will receive financial support and be rewarded in the promotion and tenure process. They also believe departmental chairpersons play an equally important role in granting release time and providing support for faculty training needed, and that the faculty senate's role is important as well for they review institutional policies governing promotion and tenure. Continuing education units and media services (displayed in concentric ring three) typically accommodate instructional support services and provide training for faculty – both of which are vitally important to distance teaching. And with the increasing integration of distance education into mainstream higher education, Olcott and Wright believe that higher education institutions should provide instructional and administrative support services designed to ensure student access to high-quality instructional programs (see concentric ring four).

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[14] Overload is defined as payment for regular teaching load, plus a supplemental payment for each additional student that enrolls.

Olcott and Wright see the challenge facing institutions committed to distance education to be achieving a balance between the use of advanced technologies and the development of appropriate human resources to support faculty and make sure they are equitably rewarded for teaching via distance. Further, they believe:

> The efficacy of distance education, like that of all instructional programs, can be measured by the extent to which it fulfills its purpose: to enhance the instructional effectiveness of faculty and thereby improve the quality of learning for all students (p. 15).

Together with the work of Dillon and Walsh, their conceptualization is frequently referenced in studies that examine faculty issues in distance education.

c. Rogers' Innovation Theory (1983)

Rogers' theory (although not a policy theory) has been widely used within studies of technological innovations (Donovan, 2004; Hoppe; 2000), and is therefore appropriate for studies about distance education. Rogers' (1983) theory about the adoption and diffusion of innovations helps to explain how the characteristics of an innovation shape faculty decisions to adopt it, and the rate at which it is adopted. The adopter of an innovation can either be an organization, defined as a stable system of individuals working together to achieve common goals, or an individual within this system (Rogers, 1995). Diffusion of innovation refers to tracing the spread of an innovation over time to members of a social system. Rogers states:

> The essence of the diffusion process is the human interaction in which one person communicates a new idea to another person. Thus, at the most elemental level of conceptualization, the diffusion process consists of 1) a new idea, 2) individual A who knows about the innovation, and 3) individual B who does not yet know about the innovation. The

social relationships of A and B have a great deal to say about the
conditions under which A will tell B about the innovation, and the
results of this telling (Rogers, 1983, p. 68).

If we apply his theory to distance teaching, the perception of distance education

by the institution, fellow faculty members and/or department chairs may be pivotal in

whether or not a faculty member decides to instruct via distance. Moore (1991) believes

that the greatest potential for failure of adoption is at the point of passage from the

visionary "early adopters" of distance teaching to the mainstream faculty. Mainstream

users do not normally adopt an innovation until they learn of their colleagues' successful

experiences with it.

Rogers delineates five innovation attributes that need to be considered when

predicting faculty adoption of distance teaching: relative advantage, compatibility,

complexity, trialability, and observability. High levels of perceived compatibility,

observability, relative advantage, and trialability are associated with increased likelihood

of adoption while high levels of complexity are associated negatively with the adoption

system. Based on these characteristics, Rogers believes chances of adoption are 1)

increased when the innovation is perceived to be better than the idea or practice that

preceded it; 2) it is consistent with the adopter's needs, experiences, and values; 3) it is

easy to understand or use; 4) it can be tried or experienced on a limited basis; and 5) the

results can be seen (Rogers, 1995). Rogers' theory implies that faculty attitude is a

significant factor in determining the rate of development and expansion of distance

education, and that faculty endorsement or skepticism can enhance or diminish the

receptivity of distance education. In this process of "diffusion innovation," it is wise for

institutions to be proactive and organize strategic developmental sessions and support for

mainstream faculty in order to address factors of awareness, access, training, time, and recognition and reward.

In order to continue this discussion about Rogers' theory and distance teaching, it is necessary to think about the relative newness of distance education programs available for study. With the first round of students from a distance education degree-granting program graduating as recent as 2000-2001 (Palloff & Pratt, 2001; Paulson, 2002), this is one reason why faculty are still questioning the results of distance education as a valid form of instruction. Results of the success of distance education degree-granting programs will naturally be limited at this point in time due to the limited number of graduates available for study. And, as the literature will demonstrate, many faculty members fail to adopt distance teaching as part of their role partly because of its perceived disadvantages and associated complexities with technology. If faculty members refrain from teaching via distance, and are vocal about their reasons for not doing so, fellow faculty members may demonstrate resistance as well. As the literature will also demonstrate, part of this resistance is due to inadequate incentives and rewards.

d. Slaughter and Rhoades' Academic Capitalism Theory (2004)

Slaughter and Rhoades see their theory of academic capitalism as an explanation for the political process of college and university integration into the new economy. "The new economy treats advanced knowledge as raw material that can be claimed through legal devices, owned, and marketed as products or services" (p. 15), which in turn, have policy implications for faculty who develop and/or teach distance education courses. Slaughter and Rhoades further suggest, "As colleges and universities integrate

with the new economy, professional groups within them have to develop strategies for how they will position themselves" (p. 27). Thus, they see faculty as actors (although not the only actors) initiating academic capitalism, rather than as mere players being "corporatized."

Their theory helps inform an understanding of the complex, policy issues (including reward structures and intellectual property) that arise as faculty build new networks that connect them with the new economy. These networks include spanning boundaries between public, non-profit, and market organizations. Slaughter and Rhoades also recognize that legislation, such as accrediting the University of Phoenix, and administrative policies that allow universities to hire part-time workers, result in practices that decenter full-time faculty. Such policy initiatives affirm lack of faculty involvement in shared governance matters such as reward structures.

Overall, Slaughter and Rhoades "conceptualize colleges and universities as shifting from a public good knowledge/learning regime to an academic capitalist knowledge/learning regime" (p. 28). However, they do not believe public good has been completely replaced; rather, they suggest that the two regimes coexist, intersect, and overlap. They contend that conferring decision-making power on institutions rather than faculty may impinge upon academic freedom as well.

Previous Research

Faculty reward structures, including promotion and tenure, have been previously operationalized in the literature. To recap, Tierney (1997) defines tenure as "an organizational structure that supports a central cultural belief of those of us in the

academy – academic freedom" (p. 17). According to the American Association of University Professors (AAUP), "Tenure is a means to certain ends; specifically, (1) freedom of teaching and research and of extramural activities, and (2) a sufficient degree of economic security to make the profession attractive to men and women of ability" (AAUP, 1995, p. 3). Diamond (1999) reports that standard promotion and tenure policies at U.S. tenure-granting institutions have probationary periods for junior faculty, offer promotion in rank, have a maximum tenure probationary period of seven years, have fairly standard academic freedom clauses, and link academic freedom and academic tenure in policy statements. Diamond also claims that on each campus there are a number of statements and policies that together provide the working base for the faculty reward system. They include:

- The institutional mission statement
- Institutional guidelines
- The school or college promotion and tenure or merit pay guidelines
- The departmental promotion and tenure or merit pay guidelines
- Disciplinary statements
- Accreditation standards

Within any context, the goal is to develop statements and policies that are both supportive and consistent.

Junior faculty reward structures are operationalized according to various dimensions – full-time, tenure seeking; full-time, non-tenure seeking; adjunct; part-time, tenure seeking; and part-time, non-tenure seeking. Although standards for promotion and tenure are in place for traditional faculty members at U.S. public, land grant institutions, we have yet to see standards regarding reward for distance education instruction.

During the 1990s, there was considerable discussion about the institutional reward system in higher education. Wolcott (as cited in Moore, 2003) believes Boyer (1990) was a herald in raising concerns about the nature of scholarship and the changing role of the professoriate. Boyer argues:

> [A] wide gap now exists between the myth and the reality of academic life. Almost all colleges pay lip service to the trilogy of teaching, research, and service, but when it comes to making judgments about professional performance, the three are rarely assigned equal merit" (as cited in Diamond, 1999, p. 2).

Boyer's position seems to be shared by many individuals in academe. For example, over 50,000 faculty, chairs, and deans at research universities (Gray, Froh, & Diamond, 1992; Gray, Diamond, & Adam, 1996) indicate that even those most directly involved with the present reward system often consider the balance between research and teaching on their campus inappropriate. The results of these studies suggest that efforts to modify the promotion and tenure system to recognize and reward teaching are supported by a majority of faculty, chairs, and deans at research universities, but it is important to note that questions about distance teaching were not included in the studies. Even Diamond and Adam's (1997) survey fails to inquire about the inclusion of distance teaching in promotion and tenure policies.

Diamond's (1999) findings do, however, support a change in faculty reward structures at U.S. higher education institutions as evidenced by his statement:

> Discussions of faculty priorities abound, with a growing number of institutions claiming an increased emphasis on the quality of teaching and on their role in the community. In practice, however, faculty reward systems at these institutions often convey a different emphasis, giving more weight to publications and scholarship than to teaching and community service, thus creating a mixed message for faculty (p. ix).

Others examined reward structures, including institutional values, faculty expectations, workload, and tenure practices (Edgerton, 1993; Fairweather, 1993; Layzell, 1997; Mingle, 1993). They, too, were especially critical of a reward system that relied on extrinsic rewards and traditionally rewarded research while undervaluing the efforts that faculty put into teaching. Reformers ended up urging a realignment of institutional priorities and values, recognition for the scholarship of teaching, and more flexible promotion criteria (Moore, 2003; Wolcott, 2003).

In the early 1990s, a number of attempts were made by researchers to measure faculty workload (American Association of University Professors, 1994; Edgerton, 1993; Russell, 1992; State Council of Higher Education for Virginia, 1991). These studies, though remarkably consistent in reporting that faculty work somewhere between 47 and 57 hours per week, suffer from two major credibility problems: 1) the studies are generally based on faculty self-reporting, and 2) many categories most central to scholarly life, such as keeping up with the field and preparing courses are suspect to public opinion and are clearly subject to ambiguity and even reporting abuse (Miller, 1994). Thus, examining faculty workloads and developing reward structures that adequately reward workload efforts is difficult. For example, course preparation and instruction can vary based on faculty member experience, number of students, technology issues, and more. In regard to distance education, this can be even more problematic merely because of the rapid changes in technology that can affect instructional practices that mainly rely on technology.

Johnson and DeSpain (2001) surveyed deans at U.S. public institutions of higher education and found that only 42% of the institutions provided monetary or other

consideration (e.g., release time) for faculty teaching distance education courses (and not always commensurate with reward for traditional instruction). Their finding supports Bates (2000) position that distance teaching ought to be considered as part of an instructor's regular workload rather than being added to existing responsibilities.

Layzell (1997) examined workload as well, and the trends and issues identified in the literature that shaped U.S. higher education in the mid-1990s. Layzell finds there are three broad categories of measures and indices to describe faculty work: faculty activity studies, instructional workload analyses, and measures of noninstructional productivity. Close examination of Layzell's work suggests that making generalizations regarding instructional workload is difficult. Studies typically focus on faculty measures such as average course loads, contact hours, and credit loads, and reveal a great deal of variance by type of institution, academic discipline, and faculty level. In addition, measures of instructional workload do not account for the time spent by faculty preparing for courses, time spent with students outside the classroom, or other instruction-related activities. Layzell asserts that no algorithm is currently available to provide a reliable estimate of how faculty members spend their time on their courses outside of the classroom. And, although Layzell mentions distance education and that it should be considered as a competitor to traditional forms of instruction (although forms of distance education were prevalent in the mid-1990s), he fails to include distance teaching in his discussion of reward structures.

Layzell's examination of the literature leads him to suggest a new organizing principle for faculty reward structures: rewards for instruction should be in line with the common goals held by *all* institutions of higher education, regardless of size or mission.

This view differs with Diamond's (1999) and Olcott and Wright's (1995) suggestions that reward should be aligned with the mission of each institution, and it also assumes that U.S. institutions of higher education share common goals (though Layzell does not provide evidence they do).

Hearn (1999) provides an analysis of historical patterns and recent salary data in order to explore the tenuous relationship between salaries and performance on U.S. campuses. And although his article is helpful because of his discussion of equity theory and the historical context he provides, his analysis only focuses on research universities and fails to examine unions or collective bargaining. Because additional stipends are found to be the most requested compensation in collective bargaining agreements for distance teaching (Berg, 2000), a more thorough analysis would be helpful to the field. Literature that connects faculty reward structures with performance is limited. Rather, the majority of the literature regarding reward structures address factors contributing to, or deterring individuals from participation.

In Hearn's (1999) article, he paraphrases Burton Clark (1987) in that "education is critical to the hopes of humanity and, therefore, the limited material rewards provided by a faculty career are overshadowed by the richness of other kinds of rewards" (p. 392). Support for Clark's inferences comes from a finding that a majority of U.S. research faculty in the late 1980s labeled themselves "satisfied" or "very satisfied" with their salaries (U.S. Department of Education, as cited in Hearn, 1999). Burton's assertion appears to hold true today for many faculty who teach; they seek intrinsic or personal rewards. Still, as Hearn demonstrates, monetary compensation is a necessity for faculty at all levels because they have to make a living and they want to be rewarded for their

contributions. With policymakers questioning traditional assumptions about the

performance and pay of faculty, observers and analysts should continue to explore

alternatives to the ways salaries are currently awarded (Moore, 2007).

The impact of information technologies on teaching and learning has added

urgency to the debate on institutional reward practices. For example, Green's Campus

Computing Survey (2000) identifies faculty rewards and recognition among persistent

problem areas. Green finds that although few institutions have policies that address

alternate forms of scholarship or reflect the dimensions of faculty roles associated with

distance education, discourse on these policy issues is increasing. As a result of this,

researchers may be interested in closely examining reward structures for instruction so

that policy suggestions can appropriately include reward for distance teaching, if

applicable. Much of the literature regarding distance education faculty discusses reward

issues, but in the larger context of faculty motivations and participation in distance

education.

While the formal faculty reward system at colleges and universities may consist

of a number of extrinsic incentives and rewards, it is dominated by traditions of awarding

tenure and advancement in rank. Because of "online" education's relative newness on

college and university campuses (though audio and videoconferencing formats have been

available since the 1980s), very few policies actually exist that address the current reward

issues in distance education (Dirr, 2003; Gappa et al., 2007; Schifter, 2005; Tallent-

Runnels, Thomas, Lan, Cooper, Ahern, Shaw, & Liu, 2006; Wolcott, 2003).

Because of the dearth of policies demonstrating distance education's value in

promotion and tenure considerations, this is one reason why junior faculty (and assistant

and associate professors who seek full professorships) can be very wary of developing and teaching these courses. In addition, these faculty members can be diverted from those activities that are more highly valued and rewarded by the institution merely because developing and instructing distance courses may initially demand more of their time than traditional courses do. This can result in decreased production of scholarly work and a reduced number of service-related activities, both of which are important components of the promotion and tenure review process.

In an effort to infuse policy reviews with relevant and accurate data, Chait (2002) and his team at the Harvard Graduate School of Education decided to inventory academic personnel policies at U.S. four-year colleges and universities. From a random sample of 1,380 U.S. four-year institutions, stratified by Carnegie classification, Chait requested policy statements in the following areas: academic freedom, probationary periods, definition and locus of tenure, faculty ranks and titles, promotion, post-tenure review, dismissal for cause, financial exigency, program discontinuance, and employment provisions for faculty at institutions without tenure. Policies from 217 colleges and universities were received. Chait discusses teaching, research and service, but with no mention of distance education or even continuing education. The problem with this omission, of course, is that one cannot determine whether or not distance teaching is rewarded in any way at any of these institutions. Much of the distance education literature would suggest it is not, but one cannot make this assumption based on Chait's findings.

Dillon and Walsh examined 24 studies on distance education faculty for their 1992 literature review. They discuss several studies in which chief academic officers at

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higher education institutions in the U.S. claimed that faculty who taught at a distance were adequately rewarded for doing so. However, the faculty at those institutions believed that institutional enrollment and evaluation policies failed to reflect equitable rewards. An analysis by McNeil (1990) indicates that even the most motivated faculty at all levels will be deterred without adequate reward. In Dillon's (1989) article, he suggests the factors that determine institutional reward structures for distance teaching include the degree of congruence between the mission of the distance education program and the institutional mission, and the institutional history of distance education delivery.

Although the majority of faculty in Betts' (1998) study (of both traditional and distance teaching faculty) felt that participation in distance education should not be rewarded differently, other studies strongly suggest it is inadequately rewarded (Kambutu, 1998; Wolcott; 1997). Clark (1993) reports that faculty members were evenly divided between those who thought that their participation would be adequately rewarded and those who did not. Faculty who doubted they would be adequately rewarded cited the following reasons: inadequate financial compensation, the extra workload, lack of rewards, concerns relating to research and publication, and distrust of administrators. Bebko (1998) and Halfhill (1998) both find fears and uncertainty regarding the tenure and promotion process and job security to be common among respondents. Indeed, the U.S. Department of Education (1997) finds that the lack of adequate rewards has been shown to be a personal disincentive as well as a barrier to institutional development in distance education. The American Council on Education (2000) identifies workload credit, and promotion and tenure concerns as among the key faculty issues to be addressed in distance education policymaking.

A well-known researcher in the area of distance education, Linda L. Wolcott from Utah State University, has been studying incentives and rewards for distance teaching for over a decade. Drawing on Landy's (1989) work motivation theory, Wolcott (1997) used a qualitative approach of semi-structured interviews and examination of promotion and tenure documents to understand how distance teaching is valued, rewarded and accommodated within the institutional reward structure. Wolcott believes that if distance teaching efforts are adequately rewarded, this will be "instrumental" in attracting faculty to this form of instruction. Based on interviews with faculty members, distance education program administrators, and the chief academic officers at four research universities,[15] her study describes a reward culture that is not accommodating to, and rewarding of faculty work in distance education.

Wolcott's study also suggests that distance teaching occupies a marginal status, it is neither highly valued nor well-rewarded as scholarly activity, it is not highly related to promotion and tenure decisions, and rewards for distance teaching are dependent on the academic unit's commitment to distance education. Questioning specifically, "How do reward processes such as tenure and promotion accommodate distance teaching in institutions that, by tradition, emphasize research" (p. 4), Wolcott finds that faculty receive little credit for developing and teaching distance education courses. In addition, she finds that the support of the institution and department head is critical, and that participation in distance education poses a risk to the junior, non-tenured faculty because it does not count toward promotion and tenure. Wolcott failed, however, to ask if junior faculty had the option of teaching via distance, or actually foregoing this opportunity

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[15] The four research universities are identified as being a part of the Western Cooperative for Educational Telecommunications, a unit of the Western Interstate Commission on Higher Education.

because of the risks involved. Cornell and Martin (as cited in Bartley, 2001) note the

resistance by faculty when they receive a mandate, rather than an invitation from

administrators to adapt their courses for distance learning.

What is also interesting about Wolcott's (1997) study is that even though distance

teaching was not adequately rewarded at any of the institutions, the concept of distance

education was found to be included in all of their mission statements and planning

documents.

Participants of Wolcott's study pointed out that junior faculty need the assurance

that in addition to teaching time-consuming distance courses (often as overload), they

will also be provided sufficient time for research and scholarship. Furthermore, junior

faculty members need to know that their contribution to distance education will receive

equitable contribution in annual performance reviews. In her (1999) study, Wolcott finds

one of the most prevalent deterrents to distance teaching to be the lack of consideration

accorded to it in annual promotion and tenure reviews.

In an earlier study, Wolcott and Haderlie (1996) provide an example of a land

grant institution that did significantly revise its promotion and tenure guidelines to reflect

changes in its vision and priorities. Wolcott and Haderlie (as cited in Wolcott , 2002)

state:

> A university-wide commitment appointed by the institution's president
> revised the tenure and promotion guidelines to make sure that extended
> education would be appropriately rewarded and recognized through
> the university's formal promotion and tenure process and that different
> roles and efforts would be credited (p. 321).

Several related assumptions underlie the development of the document. The committee recognized that expectations are not the same for all faculty members; courses developed for distance education are not scholarly work, but are works that can be evaluated by peers and documented as such. If institutions include an evaluation component to distance education instruction, faculty can be evaluated based on role expectations and their performance; appropriate peers and administrators can do the judging. Wolcott and Haderlie believe revising the reward system to make distance education part of the institutional mission aligns a significant aspect of faculty work with institutional goals.

Schifter (2000) finds that 43% of the 160 institutions represented in her survey report that participation in distance education is applicable toward tenure and promotion. According to the respondents, "Teaching a distance education course is treated just like any other teaching assignment, service or professional development [activity]" (p. 4). It is important to note, however, many of these institutions do not have specific policies that consider all facets of distance education, including the time needed for creation of online courses and assignments, additional workload, and technological training. In addition, Schifter does not define what she means by "professional development activities." Passmore (2000), in his review of a decade long study of this subject, concludes that incentives are lacking for some faculty members to participate because there are no reward systems for instructors taking on the perceived increased workload and additional training that are required for proficiency in this environment.

Bodenbender's (1998) dissertation focuses on nursing faculty members at the University of Iowa. Many participants of this quantitative study strongly believe that

participation in distance instruction is deserving of professional recognition and needs to be considered in the promotion and tenure process. Yet Kambutu (1998) notes that the majority of administrators he studied at 67 land grant, higher education institutions in the U.S. reported that distance teaching did not receive consideration during the promotion and tenure decision process, and that it was not recognized by departments and senior faculty members. Kambutu concludes that "distance instruction is not instrumental in attaining some of the extrinsic awards valued by faculty such as workload policies that recognize distance teaching, career promotion, tenure, and status in the institution" (p. 146).

Six studies from the higher education literature specifically examine compensation practices for distance instruction at higher education institutions in the United States (Berg, 2000; Kambutu, 1998; National Center for Education Statistics, 2002; National Education Association, 2000; Schifter, 2000; Wolcott & Haderlie, 1996). Two major types of direct compensation for distance education faculty are identified: compensation for *developing* distance education courses, and compensation for *teaching* them. Indirect compensation is identified as intellectual property rights, royalty arrangements, professional recognition, and training. Although many senior level faculty members report being less interested in direct compensation for distance teaching efforts, and more interested in intrinsic and personal rewards, these studies all find that junior faculty members at higher education institutions in the U.S. are primarily concerned about compensation and reward for their work, especially when seeking promotion and tenure.

National studies are increasingly focusing on distance education, including examination of reward structures for faculty who teach via distance (The National Center for Education Statistics, 1999; The National Education Association, 2000; The Sloan Consortium, 2007). The U.S. Department of Education's National Center for Education Statistics (NCES) has conducted several studies over the past nine years focusing on distance education in the United States. Their February 2002 report uses data from the 1999 National Study of Postsecondary Faculty (NSOPF:99) to provide a general appraisal of whether workload and compensation differ for faculty who do or do not teach distance classes. In the introduction, NCES asserts the findings of the study describe the relationship of participation in distance education to other aspects of faculty work, such as workload and student interaction. In addition, NCES suggests that incorporating distance education into faculty schedules as part of regular teaching loads, as overloads, or on a class-by-class basis may have implications for the compensation faculty receive for their work, and that the results of the study serve as a baseline for studies of trends in faculty participation in distance education using future data collections (NCES, 2002). The strength of the report is that it demonstrates government interest in reward structures for faculty who teach via distance.

In regard to compensation, NCES finds that the basic salary instructional faculty and staff received from their institutions for calendar year 1997 was similar regardless of participation in distance education. Distance education faculty and staff did, however, receive about $1,700 more in additional institutional income (beyond their basic salary) than those who did not teach such classes. NCES also finds that the overall teaching load

for instructional faculty and staff teaching distance classes was somewhat higher than for those teaching in the traditional format.

While examining the report, several flaws were identified that are important to mention: 1) terms such as *distance education program* were not defined for the respondents (though respondents were asked to indicate whether each class they instructed was taught "through a distance education program"); 2) detailed questions about instructional practices in individual distance education courses, modes of technology, and training are lacking; and 3) respondents are both faculty (with faculty status) and staff members from the institutions (without faculty status), yet are not distinguishable in all tables and figures (see Figure 2.3). The last of these makes it difficult for comparisons to be made to other researchers' findings that do not include non-faculty staff as respondents. In addition, the report fails to demonstrate how non-faculty staff who teach affect the reward structures at the institutions that were surveyed for NSOPF:99.

The National Education Association (NEA) (2000) commissioned a study on traditional and higher education NEA members because of the increasing number of distance education offerings at U.S. colleges and universities. The NEA's study finds that one in ten higher education NEA members has taught a distance education course in the past, and that 90% of the faculty who have taught traditional courses report that distance education was either already offered at their institution, or it was being

Figure 2.3   Distance Education Classes Taught: Fall 1998

Average No. of DE classes taught by full-time instructional faculty and staff at degree-granting institutions, by participation in distance classes and institution type: Fall 1998
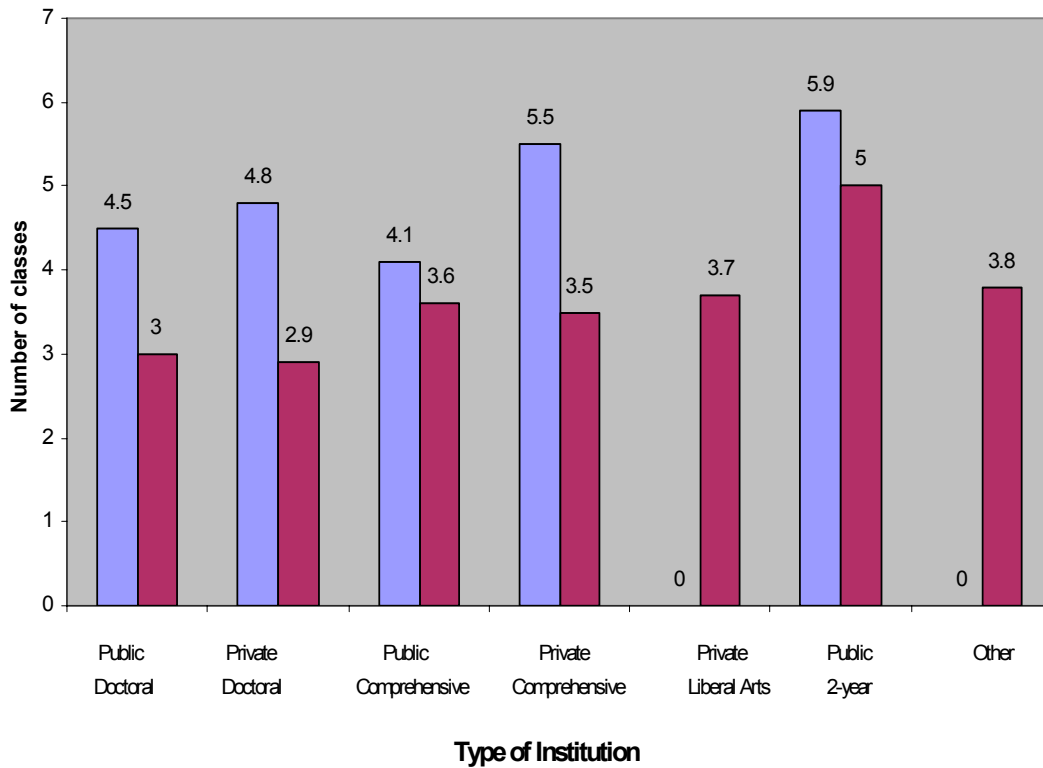
Source: NCES, 2002, pg. 35

LEGEND:
Taught DE class
Did not teach DE class

considered. The study includes a section about compensation practices occurring at

traditional and public, two-year and four-year colleges and universities with NEA

members, including an examination of the time involved to teach a distance education

course.

Respondents of the NEA study report that distance teaching requires more time

than teaching a traditional course. Even those who had taught their distance education

course eight times or more still report spending more hours (48% of respondents) rather than less hours (21% of respondents) teaching this type of course. In spite of spending more hours on their distance education course, most of the faculty (84%) received no reduction in their course load (see Figure 2.4). The NEA also finds that faculty members generally volunteer to teach a distance education course (as opposed to being told to do so), even though administrators are generally found to be the stronger proponents of distance education on campus. Thus, the NEA's report is helpful because it is the only study out of those reviewed that provides results regarding faculty volunteering for distance teaching versus distance teaching appointments.

The NEA report fails, however, to provide any additional information regarding compensation practices at U.S. institutions of higher education. In addition, only institutions with NEA members were surveyed for this study, thus inferences cannot be made about non-NEA member institutions in the U.S. A survey update that the NEA conducted the following year provides more detailed information regarding what faculty desire in terms of compensation. In March 2001, the NEA followed up on their faculty survey on traditional and distance education faculty by holding focus groups with 12 of the initial respondents. In summary, faculty said they wanted enrollment limits, compensation the same as faculty received for teaching traditional courses, intellectual property rights, and release time only if they *developed and taught* the distance education course. Interestingly enough, faculty members were very concerned about the friction and division that could emerge within the faculty group at their respective institutions as

**Figure 2.4   Percentage of Faculty Who Received A Reduction in
Their Course Load for Teaching a Distance Course**

Not sure -- 2%

Yes, a
reduction

14%

84%

No reduction
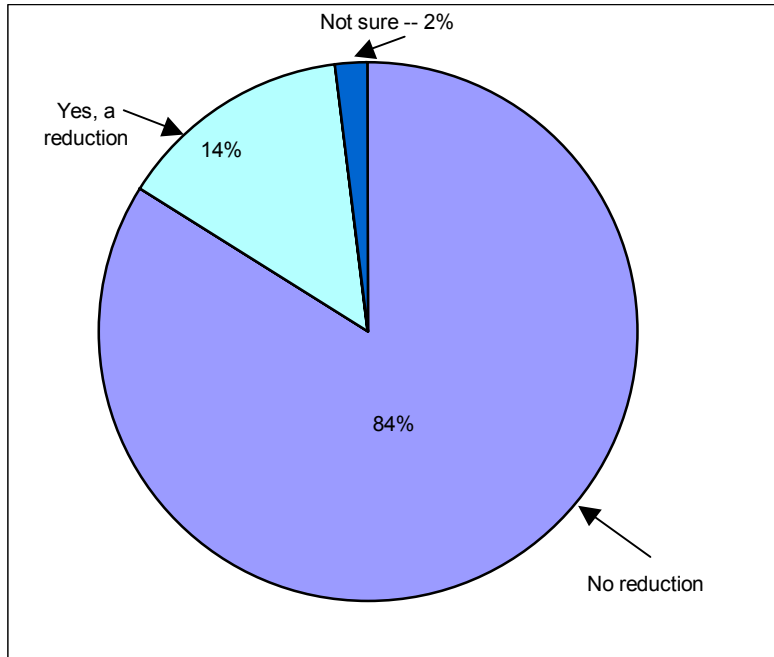
Source: National Education Association. (2000). *A survey of traditional and distance learning higher
education members*. Washington, DC: Author.

a result of distance education faculty being given special treatment. In fact, respondents

felt that the possibility of a few extra hundred dollars for the added time needed to teach a

distance education course was not enough incentive for incurring the likely divisiveness

that could follow.

Kambutu (1998) reports that supplemental compensation was one of the most

frequently offered incentives at the 67 land grant institutions he examined, but that more

than half of the institutions did not offer incentives such as release time, extra

compensation, and favorable workload policies. Berg (2000) finds that collective

bargaining agreements demonstrated a union preference for receiving an additional

stipend over additional preparation time.

In Schifter's (2000) survey of faculty who are members of the National

Association of State Universities and Land Grant Colleges, she separates out issues of

faculty compensation and incentives for developing a distance education course from

those of teaching one. Her study deserves attention because she is one of the rare

researchers to actually separate the two issues. Schifter uses a national sample to

examine which compensation models are being used nationwide to support distance

education. She finds the most often paid expense reported for faculty developing a

course is the Internet service provider cost, while expenses indicated as almost never paid

are graduate assistants and faculty overload[16] pay. Differences in overload pay depend

on school, department policies, faculty rank or level, and union contract terms (Schifter,

2000). More important, Schifter asks respondents about compensation for distance

teaching. Similar to overload pay for developing a course, she finds overload pay for

teaching a course occurs based on university or department policies, faculty rank or level,

and union contract terms.

The results of her study indicate there are no clear models of faculty

compensation or incentives for participating in distance teaching because compensation

practices vary on many points, including whether the educational institution is public or

private, two-year or four-year, the years of institutional experience with distance

education, the nature of union contracts, and more. According to the respondents, faculty

compensation is slightly higher for developing a distance education course than it is for

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[16] Again, overload is defined as payment for regular teaching load, plus a supplemental payment for each
additional student that enrolls.

teaching one. This finding is interesting given the anecdotal reports that teaching a

distance education course requires significantly more faculty time and energy than

traditional courses. In fact, the lower compensation for teaching a course may be

reflective of the "lack of institutional support" that Olcott and Wright suggest as a barrier

to faculty participation.

Wolcott and Haderlie (1996) find that extrinsic incentives can take many forms,

including workload adjustments such as release time, a modified or reduced teaching

assignment, or a mini-sabbatical. In addition, the land grant university they study reports

offering distance instructors the opportunity to teach the distance education course as part

of one's regular load rather than as an overload, or additional compensation or an

overload stipend if they preferred. Thus, institutions could attempt to motivate their

faculty with a workload adjustment when faculty develop and design distance course

offerings. But it is important to note that not all motivation efforts will best serve all

faculty members.

Bower (2001) claims that a number of institutions have found special upgrades in

office computer equipment are a well-received form of compensation for distance

education faculty, as are adjusted salary and course load. In addition, Bower states,

"Recent investigations have indicated that low-cost incentives such as public recognition,

notes of appreciation, or special parking privileges are also effective demonstrations of

support" (p. 6). Wolcott (1997) reports similar findings.

Rockwell, Schauer, Fritz and Marx's (1999) study divides respondents by faculty

member's appointments, expertise, and years of experience. Their study reveals that

tenured and senior level faculty members rank reduction in duties and increase in pay as

aspects of lower concern, whereas their counterparts rank them the opposite. This is due

to the increased pressure on junior faculty to publish, effectively teach, and be involved

in service activities, all of which are important to the promotion and tenure process.

Junior faculty are also paid significantly less than tenured faculty, thus the higher concern

for an increase in pay if the tasks associated with teaching via distance push them away

from traditional activities that count towards promotion and tenure.

Meyer's (2002) study of five institutions that are part of the Western Cooperative

of Educational Telecommunications (WCET)[17] focuses on the impact of various policies

(e.g., faculty compensation, workload, intellectual property) associated with distance

education and how they affect faculty behavior. The findings of her study demonstrate

that faculty policies for compensation, workload, and intellectual property at the five

institutions were all found to be supportive of faculty teaching via distance. Meyer

suggests that this support likely exists as a result of the institutions' longer experiences

with distance education programs than many other institutions in the U.S. She further

suggests that institutions either adopting, or considering adoption of distance education

programs explore similar policy initiatives.

Summary of the Literature

What the body of literature demonstrates is that institutions have choices

regarding reward structures. Favorable policies addressing faculty issues may attract

faculty who are considering venturing into this form of instruction. Olcott and Wright

(1995) argue that if higher education institutions include distance education in their

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[17] The Western Cooperative for Educational Telecommunications (WCET) includes over 150 institutions that pay dues to participate in WCET and are, thus, a group that is largely aligned with the pro-distance education values of the organization.

strategic plans, faculty issues need to be considered when designing programs and policies. They further argue that an institutional support framework must provide institutional commitment to its distance education instructors, and Olcott and Wright's progressive policy suggestions go beyond merely identifying the incentives and obstacles associated with this form of instruction.

As one can gather from the literature identified, institutions of higher education are *slowly* beginning to recognize the efforts of their distance education faculty by means of institutional policies or initiatives that provide incentives and reward. The resistance to distance education instruction that is still occurring at higher education institutions in the U.S. can be characterized by a lack of faith that institutions are supporting their faculty in their efforts to transform learning through information technology, and that adequate policies are lacking in this area. The history of distance education reveals that status and quality issues emerge when disparities arise between face-to-face teaching and faculty in distance education (Larreamendy-Joerns & Leinhardt, 2006). Larreamendy-Joerns and Leinhardt further suggest:

> Problems emerge when there are disparities in hiring practices, academic qualifications, research opportunities, and criteria for evaluation, most notably, when distance faculty are outside the tenure stream and of lower rank (p. 582).

Although research findings from the higher education literature indicate the need for institutional commitment and support for successful teaching in both the traditional and distance education format, the research uncovers little evidence of such commitment for distance teaching as compared to traditional teaching. In fact, the research characterizes institutions as largely indifferent and inconsistent with faculty reward in an environment where distance education is considered peripheral to the real mission of the

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institution. Thus, the empirical evidence presented in the literature suggests distance

teaching is inadequately rewarded at the majority of higher education institutions in the

U.S. And, although faculty members will differ in what they consider as "adequate" for

reward of distance teaching efforts, the research conducted thus far demonstrates that

distance teaching is not typically rewarded commensurate with traditional teaching.

Several researchers have demonstrated that without institutional support and

policy initiatives, faculty at all levels may resist participating in an institution's distance

education efforts. Olcott and Wright's (1995) research has led them to suggest the need

for a renewed institutional commitment to faculty. In higher education, it is important to

recognize that all educational institutions are mission driven, and it will likely be easier to

gain faculty support for distance teaching if faculty members believe it supports the

mission of the institution, and that the institution is committed to their faculty members.

Although the literature has identified the intrinsic and personal rewards faculty may seek,

money is often a good motivator. Money may rank as a higher priority for junior faculty,

but researchers have demonstrated that senior faculty can also be concerned with

compensation if they are developing a distance education course and/or taking on a heavy

teaching workload. Having effective compensation and reward structures in place and

evaluative procedures that include peers, may attract and retain qualified faculty to the

distance education environment.

Conceptual Framework for the Study

A conceptual framework (see Figure 2.5) emerged from the literature review and

examination of distance education policy. And although theories that underlie distance

teaching were previously discussed and can help inform this study, these theories are inadequate for the conceptualization that is now needed as we go forward with research in this area. For example, Olcott and Wright's (1995) frequently referenced *Faculty Support Model*[18] for distance education faculty fails to consider the relationship of an institution's mission, a means of conveying institutional values, to its reward structures and policies for distance teaching.

It is important that new conceptualizations drive future research in order to understand and address the relationships that exist. Researchers have previously examined what factors influence the participation of faculty who teach in the traditional and distance format, yet there is a dearth of research that goes beyond merely examining what these factors in distance education are. As a result of the review of the literature, there is an apparent need for further exploration of the relationship of these factors to institutional missions, institutional commitment to distance education, and policies related to distance teaching. Thus, the framework presented provides a conceptualization that considers the evolution of distance education and its place in U.S. higher education institutions. The framework 1) synthesizes the research findings by demonstrating the interdependence of the institution, the administrator, the faculty member, and technology services for distance education; 2) emphasizes the increasing dependence on instructional technology; 3) indicates factors that have been found to influence distance education teaching participation, including extrinsic and intrinsic rewards; and 4) suggests further

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[18] Olcott and Wright's *Faculty Support Model* can be found on page 51 of this paper.

Figure 2.5   **Conceptual Framework**
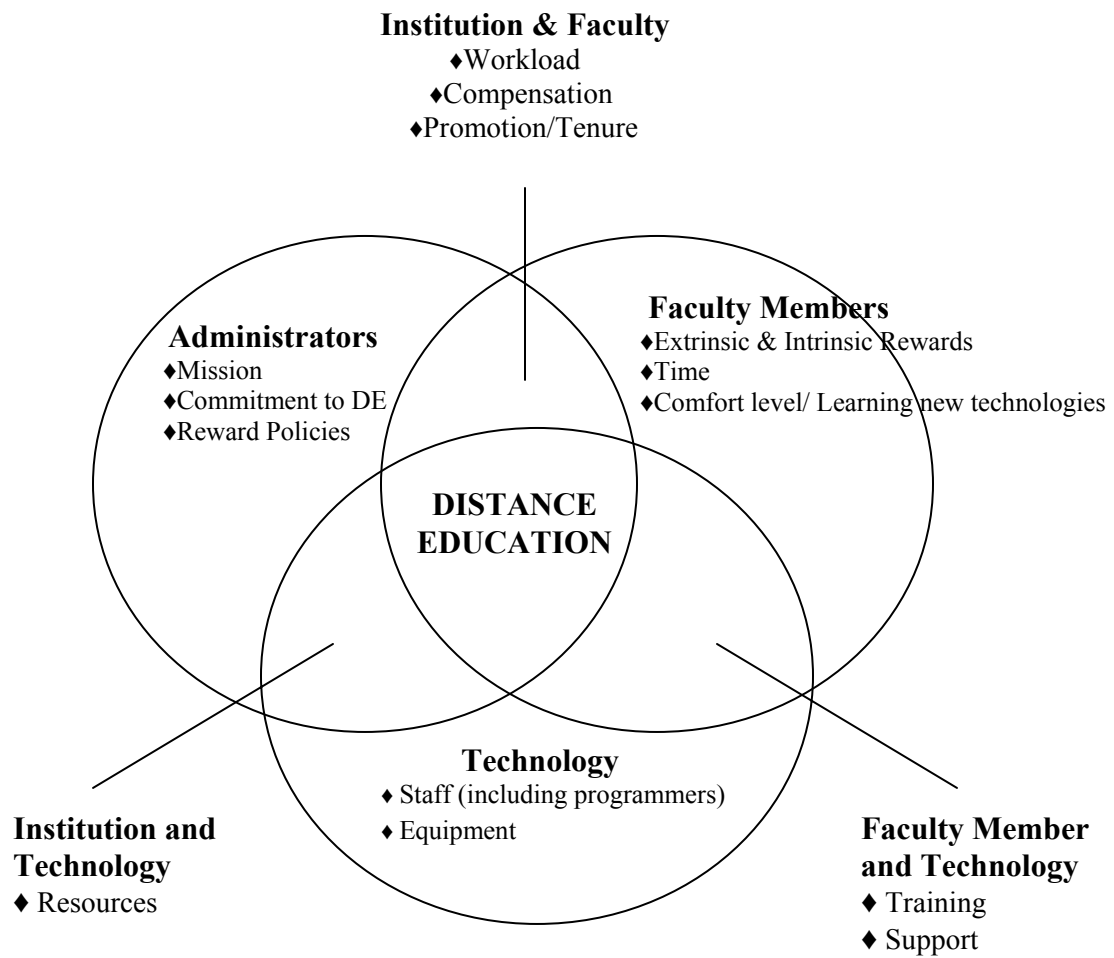
Institution & Faculty
♦Workload
♦Compensation
♦Promotion/Tenure

Administrators
♦Mission
♦Commitment to DE
♦Reward Policies

Faculty Members
♦Extrinsic & Intrinsic Rewards
♦Time
♦Comfort level/ Learning new technologies

DISTANCE EDUCATION

Technology
♦ Staff (including programmers)
♦ Equipment

Institution and Technology
♦ Resources

Faculty Member and Technology
♦ Training
♦ Support

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exploration of how an institution translates its values and commitment to distance

education in relation to reward policies and support of distance teaching faculty.

For instance, administrators play a major role in mission formation, language, and

changes to it (Bok, 2003; Diamond, 1999; Eulau, 1998; Moore, 2007; Olcott & Wright,

1995). At decentralized institutions (such as MSU), administrators are in charge of their

units, and therefore lead the commitment to distance education by the unit. In addition,

unit administrators greatly influence formal and informal reward structures for faculty

(Wolcott, 2003).

With regard to the institution and faculty, also noted in Figure 2.5, the literature

demonstrates that faculty workloads typically vary in higher education units (Baldwin &

Chronister, 2001; Blackburn & Lawrence, 1995; Milem, Berger, & Dey, 2000), as does

compensation for course development and instruction, including distance education

efforts (Berg, 2000; Gappa et al., 2007; Sutton & Bergerson, 2001). Berg (2005) argues

there is indication that when implementing distance education, faculty workload is at

least initially increased rather than decreased. And Sutton and Bergerson (2001) posit:

> Throughout the variety of criticisms of higher education, faculty
> compensation represents the single common element. As institutional
> policymakers develop an agenda for a new decade, faculty compensation
> must be considered an important factor in achieving an institution's
> goals. Institutions need to ask themselves what kind of institution
> they want to be and how they can achieve those goals. For an institution
> that wishes to increase its faculty productivity, become cost efficient, and
> achieve an improved public perception, faculty compensation represents
> an important additional management tool that can be used (p. 3).

Bates (2000), Moore (2003) and Wolcott (1999; 2003) argue for the inclusion of

distance education in promotion and tenure policies and guidelines, all the while

understanding the interplay of institutional priorities and values, administrator influence,

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and faculty reward desires. In addition, faculty members want adequate technology

support and the time needed to devote to distance education course development and/or

instruction. The literature, in fact, demonstrates that lack of technology support and the

perceived amount of time it takes for distance education can both be major deterrents to

faculty distance education involvement (Betts, 1998; National Education Association,

2000; Passmore, 2000). And although Burton Clark (1987) emphasizes the "richness" of

intrinsic rewards received for instruction, extrinsic rewards are found to be more valuable

to junior faculty members (Passmore, 2000; Schuster & Finkelstein, 2006; Wolcott,

1999).

The relationship between faculty members and technology can be one of

frustration, as well as one of satisfaction if faculty members feel they have received

proper training for distance education and the technological support that can contribute to

the avenue of success (Bebko, 1998; Green, 2000; Simonson, 2002). As Schifter (2002)

asserts, "The technical supports are a major consideration for Web-based courses. A very

helpful, knowledgeable, and available Help Desk (i.e., 24 hours/7 days per week/52

weeks per year) is essential to the success of a [DE] initiative" (p. 219).

According to Boettcher (2002), technology is what makes distance education

possible. Technology includes not only the necessary systems and equipment, it also

includes support staff, such as programmers. Institutions and technology are inextricably

linked by the resources that assist with its interactive and collaborative nature.

As the conceptual framework in Figure 2.5 suggests, the interconnectedness of the

institution, its administrators and faculty, and the technology needed to support distance

education efforts can certainly not be underestimated. We are witnessing the growth of

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technology-mediated communication and the changes in access and delivery of

education. The information age is changing the academic life of faculty as well. Judging

from the existing literature, institutional rewards for distance teaching are not in sync

with rewards for traditional instruction at many institutions of higher education in the

United States. Traditional models for faculty reward are no longer adequately meeting

the needs of instructors in a complex, dynamic society where distance education offerings

are becoming much more prevalent on U.S. campuses. Conceptual frameworks like the

one presented here can help drive the future research that is needed in this area.

CHAPTER THREE

RESEARCH DESIGN AND METHODS

This case study was designed to understand distance education policy from the perspective of the internal stakeholders -- MSU administrators, faculty and support staff. The study was prompted by the dearth of research on distance education policy, although distance education offerings continue to increase. The intention was to explore how MSU translates its values regarding distance education and reward for distance education instruction. Specific aims included 1) identifying the importance of distance education at MSU; 2) identifying how MSU colleges and departments convey their commitment to distance education; and 3) providing a deeper theoretical understanding of reward policy for distance education instruction.

This chapter contains a description of the methods that were used to complete the study. The chapter begins with the central research question and sub-questions investigated. A rationale for choice of institution and choice of method is presented, as is a description of the sampling frame for the study. Data collection methods employed are described. A discussion of the intended data analysis is included, and several basic strategies for enhancing internal validity and construct validity are introduced. In addition, several techniques are presented that help to ensure that the results are dependable (reliable). Ethical considerations are offered, and the limitations for the study are conveyed with a chapter summary following.

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Research Question and Sub-questions

The primary research question is: **How does Michigan State University translate its values regarding distance education into reward policy for junior faculty who teach via distance?** In order to address this research question, the following sub-questions were investigated:

- ♦ What is the importance of distance education to MSU?

- ♦ How do MSU colleges and departments convey their commitment to distance education to junior faculty and others in the MSU community?

- ♦ How is the assessment of distance education instruction integrated into the tenure and promotion system of the University?

- ♦ What other types of rewards do faculty members receive for teaching distance education courses?

Choice of Institution

The institution represented in this study has a tripartite mission consisting of research, teaching, and service, and reflects the changing climate in higher education. Similar to other U.S. institutions of higher learning, it is under considerable pressure to hold down costs while providing high quality programs and greater access to educational opportunities, and accommodating the demands of a changing student population. In an effort to respond to these challenges, a number of its academic units have sought solutions in distance education (DE). As a land grant university, it has a history of, and a commitment to outreach activities. Along with teaching and research, service remains an integral part of its mission. The institution that constitutes the sample frame for this study is Michigan State University.

In fact, MSU strategically aims to be recognized worldwide as the leading land grant, research university in the United States by 2012 (as touted on the MSU website under "Strategic Positioning"). Their strategic positioning, known as "Boldness by Design," will be discussed in more detail in the next chapter.

The predecessor (a state college of agriculture) to Michigan State University was founded in 1855 and was a prototype for sixty-nine land grant institutions, some of which were established under the Morrill Act of 1862. Currently, MSU offers more than two hundred programs of study from fourteen degree-granting colleges, and has an affiliated law college. In addition, the university offers distance education courses and degree programs as part of their regular academic offerings. Michigan State "Virtual" University is a name that MSU uses on their website to refer to courses and instructional programs offered through the Internet and other technologically-enhanced media. New technologies made it possible for MSU to offer instruction without the time and place constraints of traditional university programs. David Gift, Vice Provost of Libraries, Computing and Technology, points out that MSU's distance education offerings include completely "online" courses, and "blended learning" courses where learning occurs both in the classroom and online (D. Gift, personal communication, March 20, 2007).

As defined by MSU under 'General Information, Policies, Procedures and Regulations,' an "online" course is a class in which all instruction is delivered in an online environment. Texts, readings lists, in-person orientations, proctored exams or other non-instructional experiences may be required as stipulated. A "blended" course (also known as a "hybrid" course) is defined as a class that blends online instruction with regularly scheduled classroom time or required or scheduled in-person contact, including

exams, labs, etc. Text, readings lists, and/or other materials are stipulated (MSU General

Information, Policies, Procedures and Regulations, 2008). Gift claims, however, that

MSU is unsure about their definitions, and in fact, does not like any pertaining to blended

or hybrid. Gift argues:

> Here, hybrid and blended mean the same thing. We find that people
> are just more comfortable with the term blended. It has fewer other
> connotations. Hybrid means lot of things today from hybrid fuels to
> hybrid vehicles, but blended, people can associate with just instructional
> techniques and not get hung up in the other stuff (D. Gift, personal
> communication, June 15, 2008).

Gift suggests that online and blended learning offerings are considered just as

important as traditional offerings at MSU. He states, "MSU has been very successful

with its distance education programs and courses, which are offered through many

departments across campus." MSU has more than a decade of experience with distance

education, and Gift argues, "The utilization of five, existing departments that work

together as a cohesive unit to assist all distance education efforts actually eliminates the

need for one central location, which is more common at other institutions." Gift also says

that to a certain extent, all five of the departments are involved with policy development

and implementation, including faculty reward (D. Gift, personal communication, March

20, 2007). Brief summaries of these five departments follow:

Libraries, Computing, & Technology

According to their website, Libraries, Computing and Technology (LCT)[19]

consists of eight academic support departments with a common mission and collaborative

approach to facilitating effective scholarship and work at Michigan State University by

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[19] *Source: http://lct.msu.edu*

connecting people and information. The website further states that LCT is the steward of

MSU's: libraries and archives; technology infrastructure for central academic and

business information; technology services, including support and training for users, in

collaboration and sharing responsibility with academic and other support departments;

overall vision for technology at MSU; and related policy and business practices.

In addition to the Vice Provost for LCT, support staff members from the two DE-

specific, LCT support departments were interviewed for this study. The following

includes a brief description of these two departments:

Distance Education Learning Services (DE Learning Services):

Distance Learning Services is designed to meet the research and
information needs of students and faculty in off-campus or online
courses, and faculty/staff in MSU off-campus units.

Virtual University Design and Technology (VUdat):

Virtual University Design and Technology has a mission
of providing professional and innovative technology-enhanced
teaching and learning solutions in support of the Michigan State
University mission.

MSU Global

MSU Global[20] provides strategic advisory services to MSU faculty, departments,

and colleges who are developing new entrepreneurial programs, including the creation of

planning tools and cost models which facilitate the University's online enrollment

growth.

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[20] *Source: www.msuglobal.com*

Office of Faculty and Organizational Development

The Office of Faculty and Organizational Development[21] supports MSU faculty, academic staff, and administrators in their ongoing quest for excellence in teaching, research, outreach, and leadership. They offer seminars and programs, services, and other resources in two programmatic strands -- faculty development and organizational/leadership development.

Online beginnings at MSU

According to Gift, the institution started with "online" offerings by merely asking willing faculty to teach them, and subsequently supported them for their efforts. He argues MSU continued with distance education offerings as part of the normal teaching load – meaning traditional and online instruction were not considered separate entities at MSU, but more so part of the overall MSU portfolio. This is key because they took away the stigma associated with online offerings that largely existed six years ago.

Dean Ames, of the College of Education, was essential to the beginning success of the distance education program. Ames said that the College of Education was going to become a "paperless" college, no matter what. She created a course on how to teach online, had faculty teach faculty, and provided faculty with laptops. The goal was to help faculty and students become comfortable with online courses and the technology involved. Her success was the model for future online and blended learning courses and programs at MSU.

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[21] *Source: http://fod.msu.edu*

Choice of Method

The conceptual framework (as displayed in Figure 2.5) that emerged from the literature review helped to clarify the main dimensions to be studied for this project, as well as the corresponding relationships among the dimensions. It also helped identify whom the key stakeholders are (institutional administrators, faculty, and distance education support staff), what to investigate (e.g., reward policies, mission statements), and what issues to explore. This conceptual framework evolved throughout the study because of the inductive nature of the qualitative inquiry itself.

In order to address the research question and sub-questions, this dissertation project consisted of an embedded, single case design with a qualitative orientation. An embedded case study occurs when, within a single case, attention is also given to a subunit or subunits (Yin, 2003). Case study was appropriate for the study because the investigator's primary interest is in reward policies and mission statements as they are interpreted and implemented by their users. The case study approach can be useful for understanding the process of distance education policy development, policy changes over time, and what the changes reveal (Nelson, 1999; Wolcott, 2003).

According to Merriam (1998), qualitative case studies are prevalent throughout the field of education. She suggests that from H. Wolcott's classic case study from 1973, *The Man in the Principal's Office,* to case studies of programs, schools, students, innovations, teachers, and policies, this type of research has illuminated educational practice for decades. Merriam argues that case study is a suitable design if you are interested in process, and asserts:

A case study design is employed to gain an in-depth understanding
of the situation and meaning for those involved. The interest is
in process rather than outcomes, in context rather than a specific
variable, in discovery rather than confirmation. Insights gleaned
from case studies can directly influence policy, practice, and future
research (p. 19).

In an article about the prevalence of qualitative methodology at the American

Educational Research Association's 2006 Annual Meeting, Eckardt (2007) indicates,

"The data tell us that qualitative research is the most popular research methodology in the

field" (p. 1).

Given the characteristics of qualitative case study research, a qualitative approach

was deemed most appropriate for this study for several additional reasons. Due to the

lack of research on distance education policy from the perspective of internal

stakeholders, close examination of faculty reward and its attendant policies is sorely

needed. In addition, the lack of testable theory of distance education policy making

(Moore, 2007; Nelson, 1999) suggests that case study is appropriate for providing a

richer and more dynamic picture of the reward process for teaching via distance, and the

influences that are affecting it. A particular rationale for a single case is described by Yin

(2003), whereby he argues that one rationale for such a study is the "representative" case.

For example, a single case may be a representative school, or an institution such as MSU.

Yin claims that the lessons learned from single cases can be assumed to be informative

about the experiences of the average institution. Michigan State University, therefore,

can possibly be considered a "representative" of U.S. public, land grant higher education

institutions that offer distance education courses and programs.

Patton (1985) claims that qualitative research strives for depth of understanding of

situations in their uniqueness as a part of a particular context, and Merriam (1998) notes

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that the philosophical orientation of qualitative research is that knowledge is constructed inductively through inquiry. While examining standards of evidence in qualitative research (in response to the National Research Council's 2006 efforts to define evidence), Freeman, deMarrais, Preissle, Roulston, & St. Pierre (2007) found that "qualitative researchers both accomplish research of high quality and have a long tradition of demonstrating quality in reports of their investigations" (p. 25).

Yin (2003) suggests that qualitative case studies are the preferred strategy "when the focus is on a contemporary phenomenon within some real-life context" (p. 1). And Maxwell, (as cited in Nelson, 1999), describes the purpose of qualitative inquiry as understanding meaning and context, identifying unanticipated phenomena and influences, understanding processes, and developing causal explanations. Maxwell also notes the practical implications of the qualitative approach: generate results and theories meaningful to those studied as well as others; conduct formative studies to improve practice; and engage in collaborative research with participants.

Within the context of a qualitative case study design, grounded theory was utilized for this study in order to emphasize theory development that is specific and useful to practice. This systematic approach to theory development is "grounded" in understanding as perceived by participants in the study (Merriam, 1998; Nelson, 1999). As Nelson further posits, "Grounded theory is informed by previous research and literature, and does not attempt to test an existing theory" (p. 31). Therefore, since a lack of testable theory of effective distance education policy emerged from the literature, a grounded theory design using the constant comparative method of analysis of data (coding, developing categories, and comparing emergent themes) was used throughout

the qualitative inquiry process to understand meaning and context, identify influences, understand processes, and develop causal explanations.

Kathy Charmaz, a leading social science researcher and exponent of grounded theory, argues that grounded theory actually moved qualitative inquiry toward explicit analytic strategies (K. Charmaz, personal communication, January 17, 2008). She asserts that Glaser & Strauss (1967) provided a powerful legitimization for inductive qualitative research, thus paving the way for a 21st century form that begins with inductive inquiry, adopts a comparative logic, tests emergent concepts, and emphasizes interaction throughout the research process (Charmaz, 2006). Charmaz further posits that grounded theory positions inquiry in its historical, cultural, social, situational, and interactional locations. She believes that grounded theory is appropriate for qualitative case study research, and that "case study in education is *very* [italics added] important" (K. Charmaz, personal communication, January 17, 2008).

Utilizing document analysis, semi-structured interviews, and the constant comparative method, study findings are presented in the next two chapters. Some strengths of documentation as a source of evidence include 1) it can be reviewed repeatedly; 2) it is unobtrusive (meaning not created as a result of the study); 3) it provides details and references; and 4) it can span a long period of time. Important to consider, however, are the weaknesses associated with documentation as a source of evidence: 1) retrievability can be low; 2) reporting bias reflects the bias of the author (who may be unknown); and 3) access may be deliberately blocked (Creswell, 2003; Yin, 2003).

For purposes of this study, seven academic subunits that offer online and/or blended courses, and the five support departments who together handle online and blended learning needs for MSU constitute the sample frame for analysis. According to Yin (2003), "subunits can often add significant opportunities for extensive analysis, enhancing the insights into the single case" (p. 46). Also according to Yin (2003), a major strength of case study data collection is the opportunity to use many different sources of evidence. Yin further posits, "The use of multiple sources of evidence can allow the investigator to address a broader range of historical, attitudinal, and behavioral issues" (p. 98). In fact, the most important advantage presented by using multiple sources of evidence to address a broader range is the development of converging lines of inquiry, a process of triangulation (Becker, 1998; Patton, 1987). As such, in addition to the interviews that were conducted, the mission statement for each of the academic subunits was examined (insomuch that one has been created for a subunit), as was MSU's overall mission statement.

Similarly, MSU policies in the following areas were examined in detail: probationary periods, definition and locus of tenure, faculty ranks and titles, promotion, and compensation. In addition, written faculty reward policies for each of the academic subunits were examined (insomuch that written policies existed for a subunit).

Sampling

Since generalization in a statistical sense is not a goal of qualitative research, probabilistic sampling was not justifiable for this study; rather, non-probability sampling was. Non-probability sampling is the method of choice for most qualitative research

since it helps to solve qualitative problems such as discovering what occurs, the implications of what occurs, and the relationships linking occurrences (Merriam, 1998). The most common form of non-probabilistic sampling is purposive sampling, which is based on the assumption that the investigator wants to discover, understand, and gain insight, and therefore, must select a sample from which the most can be learned (Schutt, 1999). Patton (1990) argues that the logic and power of purposive sampling lies in selecting "information-rich cases" for study in depth.

To begin purposive sampling, one must first determine what selection criteria are essential for the study (Merriam, 1998). Therefore, in order to address the research question and sub-questions, 1) faculty members from each of the seven academic subunits identified that currently offer online and/or blended learning courses; 2) at least one administrator from each of these seven subunits; and 3) at least one staff member from each of the five support departments that assist online and blended learning efforts including David Gift, Vice Provost of Libraries, Computing and Technology, were interviewed for the study (n=29). Thus, the MSU academic subunits for analysis in this case include: The College of Education, College of Nursing, College of Social Science's School of Social Work, Department of Geography, Department of Psychology, School of Packaging, and the School of Criminal Justice.[22] In addition, the subunits vary in their use of technology, which contributes to variation among them. Gift says there is also variation in terms of policy implementation among the subunits (D. Gift, personal communication, March 20, 2007). Support departments include: Libraries, Computing

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[22] Several other MSU academic subunits are in the process of adding online and blended learning courses to their curriculum, and therefore, can be included in future studies.

and Technology; MSU Global; DE Learning Services; Virtual University Design and

Technology; and the Faculty Office of Development.

Data Collection

Participant Interviews

The interviews for this study were mostly conducted at Michigan State University

in East Lansing, Michigan. Several interviews were conducted via telephone in order to

address in-person scheduling conflicts. The interviews ranged in length from 40 minutes

to 2 hours, and were exploratory in nature. The interviews for this case study were

mainly of an open-ended nature, in which key participants were asked about MSU reward

structures and values. An interview guide consisting of ten questions (derived from the

guiding conceptual framework and research questions) was utilized for each of the

interviews. The interview guide consisted of five core questions that were first posed to

each participant, with five subsequent questions posed, but varied based on the

participant's role at MSU: whether faculty, administrator, or support staff (See Appendix

A, B, & C). In some situations, the investigator asked participants to propose their own

insights into certain occurrences as the basis for further inquiry.

By conducting interviews of the appropriate MSU faculty, administrators, and

support staff, a consistent line of inquiry was pursued whereas the actual stream of

questions was fluid rather than rigid. This means the investigator for this study had two

jobs throughout the interview process: 1) to follow the line of inquiry, as reflected by the

case study protocol; and 2) to ask the actual interview questions in an unbiased manner

that also served the needs of the line of inquiry. In order to do this, the interviewer

looked to Becker's (1998) suggestion of posing "why" questions as "how" questions so

the needs of the line of inquiry were satisfied and were simultaneously put forth as

friendly and non-threatening.

Extant Texts

Extant texts for this study (i.e., mission statements and policy documents) were

obtained from MSU's website or from study participants (mainly administrators). As

Merriam (1998) argues, "Data found in documents can be used in the same manner as

data from interviews or observations," and can be used to "furnish categories and

hypotheses, offer historical understanding, track change and development, and so on"

(p. 126). Findings from the interviews and extant text analysis are discussed in the next

two chapters.

Data Analysis

As discussed in Chapter Two, the conceptual framework that emerged from the

literature was used as the guiding theoretical framework for the study. The framework is

intended to become a resource for administrators, faculty, and staff in institutions who

want to more fully support faculty members who teach via distance, while at the same

time wanting to maximize the contributions of these faculty members in the achievement

of institutional goals. The study sought to address the research question and sub-

questions posed based on analysis of the data resources obtained from document analysis

and interviews, and included sorting the data, achieving local integration, achieving

inclusive integration, and coding. As Weiss (1994) asserts, "Certain analytic processes show up in every analysis of the data of qualitative interview studies" (p. 181).

Extant Texts

Kathy Charmaz (2006) points out that qualitative researchers often use extant texts as supplementary sources of data. In her research, in addition to starting with the content of the texts, Charmaz addresses text structure, and the relationships between structure and content by using guiding questions to assist with her exploration. For purposes of this study, the investigator deemed the following Charmaz guiding questions[23] as appropriate for assisting with the analysis[24] of relevant MSU mission statements:[25]

- ♦ How was the mission statement produced? By whom?

- ♦ What is the ostensible purpose of the statement? Might the statement serve other unstated or assumed purposes? Which ones?

- ♦ Which contextual meanings does the statement imply?

- ♦ How does its content construct images of reality?

- ♦ Who benefits from the mission statement? Why?

As a form of member checking, these questions were posed to administrators from the seven academic subunits, and to an MSU administrator from the Office of the

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[23] Questions are modified, if necessary, to make them more specific to mission statements.
[24] These findings are presented in Chapter Four.
[25] The School of Social Work does not have its own mission statement; rather, it is under the umbrella of the College of Social Science's mission statement. However, the School of Social Work does have its own values statement, which was examined for purposes of this study.

Provost, in order to gain additional insight into the development and purpose of the respective mission statements.

In order to examine relevant MSU policy documents, the following Charmaz guiding questions were considered:

♦ What are the parameters of the policy?

♦ What does the policy mean to various participants?

♦ What does the information leave out?

♦ Who benefits from shaping and/or interpreting this information in a particular way?

♦ How, if at all, does the information affect actions?

Extant text analysis findings are discussed in Chapters Four and Five.

Participant Interviews

In order to assist with managing and analyzing the documentary materials for this dissertation project, a qualitative research software program known as ATLAS/ti was used. By utilizing ATLAS/ti, a formal, presentable database was constructed and includes interview notes and transcripts, and information obtained from document analysis. In this manner, a case study database markedly increased the reliability of the entire case study (Babbie, 2004; Yin, 2003). The ATLAS/ti software was used to code the documentary materials and rearrange them throughout the iterative process of data resource analysis, and the case study notes were protectively stored (divided by major subjects) in such a manner that the investigator can retrieve them efficiently at a later date.

Data analysis commenced with each of the interviews being fully transcribed into a Word document, and then uploaded into ATLAS/ti as a primary document. The interview transcripts were then carefully read three times (line by line) before open coding began. According to Erickson (as cited in Freeman et al., 2007, p. 149), a classic consideration of qualitative methods in education asserts, "the corpus of materials collected in the field are not data themselves, but resources for data." Therefore, documentary materials such as interview transcripts are "resources" from which data was constructed through a formal means of analysis -- the process of open coding.

The process of open coding, the initial classification and labeling of concepts in qualitative data analysis, allows for close examination of the discrete parts of the data and comparison of them for similarities and differences (Babbie, 2004). In the open coding stage, concepts emerge from the data inductively. By first studying the data through line-by-line coding, two important criteria for completing a grounded theory analysis began to be addressed -- that of fit and relevance. Following Charmaz's (2006) suggestion, "focused" coding then commenced, whereas the most significant and/or frequent earlier codes from the line-by-line coding were used to sift through the data. Charmaz explains, "Focused coding requires decisions about which initial codes make the most analytic sense to categorize your data incisively and completely" (p. 57).

Glaser (1978) discusses using gerunds when coding, and how they can help a researcher detect processes and stick to the data. And Charmaz (2006) argues that we gain a strong sense of action and sequence with gerunds. She states:

> Staying close to the data and, when possible, starting from the words
> and actions of your respondents, preserves the fluidity of their experience
> and gives you new ways of looking at it. These steps encourage you to
> begin analysis from their perspective. That is the point. If you ignore,

gloss over, or leap beyond participants' meanings and actions, your
grounded theory will likely reflect an outsider's, rather than an
insider's view (p. 49).

The utilization of active verbs, therefore, occurred throughout the coding process

for this study to aid the researcher in staying close to the data while minimizing an

outsider's view. What was found from the focused coding (i.e., categories and themes)

was then used to specify possible relationships between the categories or themes (also

known as 'theoretical coding'). Glaser (as cited in Charmaz, 2006) introduced theoretical

codes as "conceptualizing how the substantive codes may relate to each other as

hypotheses to be integrated into a theory" (p. 63). Glaser believes theoretical codes are

integrative and lend form to the focused codes that have been collected. Therefore, they

not only conceptualize how the substantive codes are related, but they also move the

analytic story in a theoretical direction (Charmaz, 2006).

Creswell (2003) asserts that categories or themes can be used to build additional

layers of complex analysis. For example, categories were developed into an expansion of

the framework that guided this study. The categories then assisted with the final stage of

the qualitative data analysis, that of providing an interpretation of the data from the

document analysis and interviews.

Validity

Internal validity deals with the question of how research findings match reality

(Merriam, 1998), and Lincoln and Guba (1985) argue that reality is a multiple set of

mental constructions made by humans. Taking this into consideration, Merriam asserts:

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Because human beings are the primary instrument of data collection and analysis in qualitative research, interpretations of reality are accessed directly through their observations and interviews. Most agree that when reality is viewed in this manner, internal validity is a definite strength of qualitative research" (p. 203).

Nelson (1999) suggests there is considerable debate about how researchers conducting qualitative inquiries assure the essential trustworthiness of their findings, and how much the checks that they employ in research design and implementation are comparable to those used by quantitative researchers.

Thus, Merriam's several basic strategy suggestions were used by the investigator to enhance the internal validity of this study. These include:

♦ Member checks – taking data and tentative interpretations back to the people from whom they were derived and asking them if the results are plausible.

♦ Peer examination – asking colleagues to comment on the findings as they emerge.

♦ Researcher biases – clarifying the researcher's assumptions, worldview, and theoretical orientation at the outset of the study.

Based on these strategy suggestions, the investigator 1) employed member checks throughout data collection and analysis to test emerging interpretations of the data; 2) engaged committee members and/or peers at the University of Michigan to help interpret findings as they developed; and, 3) clarified the investigator's position and biases at the very beginning of the interviews. In addition, the investigator provides rich description to convey the findings in Chapters Four and Five.

Construct Validity

Trochim & Donnelly (2006) suggest construct validity refers to the degree to which inferences can legitimately be made from the operationalizations in a study to the theoretical constructs on which those operationalizations were based. Therefore, evidence from the interviews conducted for this study is presented here to demonstrate that the emergent categories and themes from the data correspond to the theoretical themes that emerged from the examination of previous literature, and to demonstrate the coding of participant responses. A detailed discussion of the emergent categories and themes follows in Chapters Four and Five.

Through the constant comparative method, eleven categories were identified that correspond directly to the conceptual framework that informed the study, and interview questions that were specifically derived from the study's research question and sub-questions. These categories are presented in Figures 3.1 and 3.2.

Michigan State University Priorities

Table 3.1 indicates the more common participant responses (as coded) regarding MSU priorities. When asked how MSU identifies its priorities, almost half of the participants identified 'World Grant' as a priority (see Table 3.1). Sterling explained what World Grant means:

> **Sterling:** That's a recent philosophical change, if you will, that's been brought on by this new president, three year president now who believes that as this state, this country globalizes, education ought to be globalizing as well. Michigan State did well in its land grant focus for the state of Michigan, and now we need to expand that land grant focus to include other places around the world, certainly not every place around the world, but a variety of places around the world.

Figure 3.1.   **Data Analysis Categories and Emergent Themes**
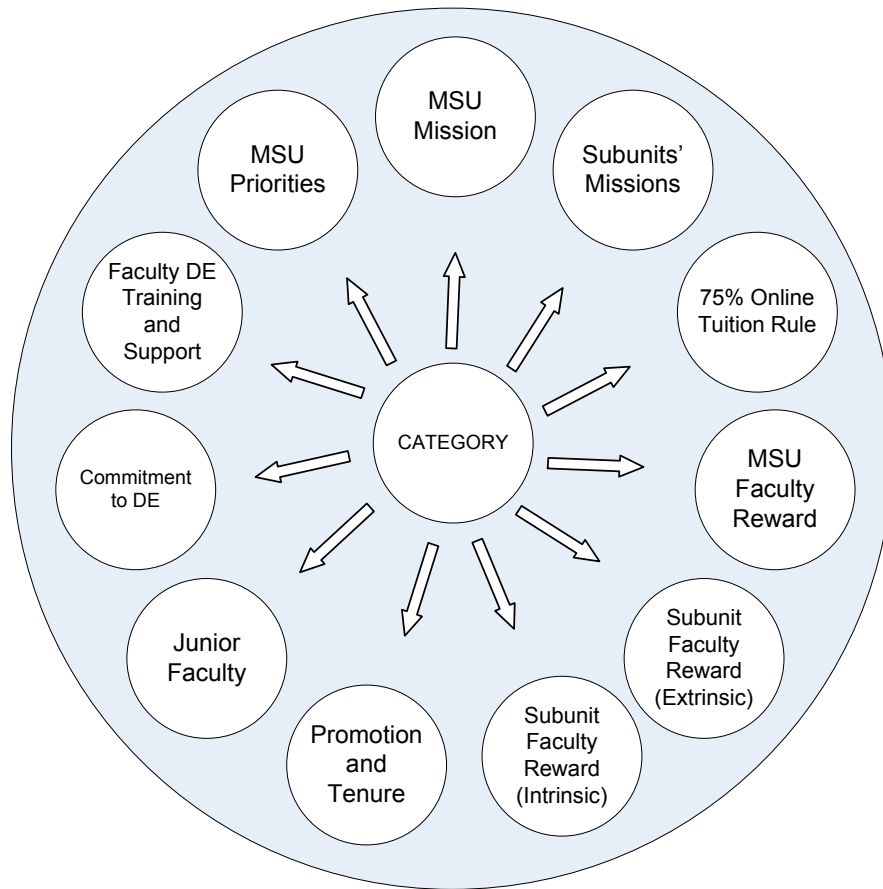
Figure 3.2   Conceptual Framework and Associated Categories

Category
Faculty Reward
(Extrinsic)

Category
MSU Faculty Reward

Category
P&T

Institution & Faculty
♦Workload
♦Compensation
♦Promotion/Tenure

Category
MSU Mission

Category
Subunits' Mission

Category
Commitment to DE

Category
Faculty Reward
(Extrinsic)

Category
Junior Faculty

Administrators
♦Mission
♦Commitment to DE
♦Reward Policies

Faculty members
♦Extrinsic & Intrinsic Rewards
♦Time
♦Comfort level/Lrng. new tech.

DE

Category
Faculty Reward
(Ext. & Intr.)

Category
Junior Faculty

Technology
♦Staff (including programmers)
♦Equipment

**Institution and
Technology**
♦Resources

Category
Faculty DE Training
& Support

Category
Faculty DE Training
& Support

**Faculty Member
and Technology**
♦Training
♦Support

Category
Faculty DE Training
& Support

Category
Junior Faculty

Numerous responses pointed to MSU's land grant mission of outreach as a priority, and thus were coded accordingly (see Table 3.1). Abby discussed community, and Carlos connected the land grant mission of outreach to distance education:

> **Abby:** I would say that a lot of it has to do with the land grant mission of the university and trying to stay true to that. Being involved in the community, service to the community, outreach to the community is still a significant contribution.

> **Carlos:** Well, I think certainly we go back to the University's mission, which is that as a land grant university we have a mission of outreach, and therefore, distance education certainly fits that mission.

Michigan State University Mission

In regard to MSU's overall mission, a relationship between distance education and MSU's Mission became apparent (see Table 3.2) through responses that are illustrative of the codes assigned:

> **William:** I think definitely so. We have a lot of our students who are now able to complete their degrees in 4 years, and before that it was something that only people who lived locally were able to do.

> **Yaron:** It [DE] is an important means by which to enhance our land grant, now World Grant, purposes.

Table 3.1   **Category: MSU Priorities**

MSU Priorities	No. of Responses (n=29)
identifying World Grant as MSU priority	13
emphasizing decentralization of MSU	12
emphasizing land grant mission of outreach	11
emphasizing MSU's global mission	10
stressing land grant mission as MSU top priority	6
implying lack of clear World Grant definition	5
implying DE may not be important to MSU	4
identifying Boldness by Design principles as MSU priority	3

Table 3.2   **Category: MSU Mission**

MSU Mission	No. of Responses (n=29)
believing DE enhances MSU mission	24
connecting land grant mission to DE	21
seeing DE as important outreach tool for MSU	15
emphasizing land grant mission of outreach	11
emphasizing MSU's global mission	10
arguing DE helps continuing education needs	9
believing DE complements traditional MSU mission	9

<u>Subunit Mission Statements</u>

Although MSU has its own institutional mission statement, it is important to gain a sense of subunit culture and how distance education fits into that culture. Therefore, participants were asked about their respective subunit mission statements[26] (see Table 3.3). If participants were unaware of a mission statement for their specific subunit, that lack of awareness needed to be recognized in the coding process. For example, Madelaine admitted, "I'll tell you the truth, I don't know." Victor claimed, "No, not aware of it." And Serena suggested, "I am not aware of it, but that doesn't mean it is not there."

<u>Online Tuition Rule</u>

Michigan State University has an online tuition rule that was discussed by some of the participants during their interviews. The rule stipulates that subunits can directly receive 75% of the tuition revenue from online enrollment of their for-credit courses for students who are not enrolled in on-campus courses during that same semester. During the coding process, specific codes were assigned as demonstrated in Table 3.4. Examples of quotes regarding the rule include:

> **Cynthia:** And so our unit is actually able to earn additional revenue through teaching distance education. So for us, the teaching of distance courses kind of goes past this what we really think is a good thing to do into we're actually earning a lot of money and in a tight budgetary climate that's been very important for us.

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[26] Only one of the seven subunits does not have its own mission statement.

Table 3.3   **Category: Subunits' Missions**

Subunits' Missions	No. of Responses (n=29)
confirming subunit has its own mission statement	12
admitting lack of awareness of subunit MS	10
stressing high faculty involvement w/MS development	9
believing DE is not mentioned in subunit MS	8
arguing DE is implicit in subunit's MS	7
arguing DE is vital to subunit	5

Table 3.4   **Category: 75% Online Tuition Revenue Rule**

75% Online Tuition Revenue Rule	No. of Responses (n=29)
stressing benefits of 75% online tuition rule	11
implying 75% online tuition rule will end	4
emphasizing attractiveness of 75% rule to subunits	3
admitting lack of awareness of 75% rule	2
expressing fear of 75% rule ending	2

Victor: So the money, and it's undesignated funds, you can do anything you want with it -- it is a phenomenal resource now. And I don't mind, I'm not bashful about this, some of us are really knocking ourselves out for this and it's brought a real serious steady stream of income, that the dean really appreciates, to the college.

Raymond: What happens is that we get ¾ of the tuition back for students who are not physically on campus at the time they take the course [both regular students and Lifelong Learning students], and that provides a significant amount of revenue for us during the summer. So if they are living in Detroit with their parents for the summer and they take an online course, we get 75% of the tuition.

MSU's Faculty Reward for DE

Participants were asked about MSU's support for distance education in regard to faculty reward. As evidenced in Table 3.5, the notions "lacking, not part of, and not reflected" were expressed through responses specifically pertaining to the institutional level, not subunit level:

Raymond: It's not reflected at all.

Yaron: And it's not at the policy level, it just isn't. I think the simple answer there is -- it isn't.

Tomoko: I don't think there's anything in the university that rewards faculty for online or distance education. I don't think there's anything. Nothing.

Table 3.5   **Category: MSU Faculty Reward**

MSU Faculty Reward	No. of Responses (n=29)
believing faculty reward varies among subunits	12
arguing DE is NOT reflected in MSU faculty reward policies	5
admitting lack of knowledge of MSU's DE reward	4
arguing DE not part of mainstream reward structure	3
arguing MSU lacks clear criteria for faculty	3
suggesting DE is NOT reflected in MSU faculty reward policies	3
stressing lack of sufficient DE faculty reward at MSU	2

Extrinsic Faculty Rewards

In Table 3.6, members of the various subunits responded to questions regarding extrinsic faculty reward for distance education instruction. Participants were asked how distance education is valued in their subunit, in terms of extrinsic reward. Responses were then coded accordingly. Some examples of responses stressing that distance education reward is equal to traditional reward for teaching include:

Patricia: It's exactly the same.

Lily: We consider online teaching and face-to-face teaching, teaching, period.

Gayle: Yes, it's equal.

Lawrence: Yeah, it is handled the same.

Table 3.6 **Category: Subunit Faculty Reward (Extrinsic)**

Subunit Faculty Reward (Extrinsic)	No. of Responses (n=29)
indicating lack of written DE reward policy	11
indicating DE financial incentive for faculty	8
confirming high faculty involvement w/reward structure	7
stressing DE reward equals traditional	7
stressing importance of subunit culture	6
arguing teaching is not valued in reward system	5
emphasizing Chair's/Director's authority re: faculty reward	5
admitting lack of knowledge re: faculty reward involvement	4
admitting lack of knowledge re: subunit's reward policy	4
arguing DE & traditional reward NOT same in subunit	4
emphasizing lack of DE reward	3
arguing DE reward is inadequate	2

Table 3.7 highlights several codes associated with participant's views on intrinsic

faculty rewards in relation to distance education instruction. As evidenced in Table 3.7,

many participants expressed personal and professional satisfaction with distance

instruction. Gayle and Carlos demonstrated their satisfaction with distance education:

> **Gayle:** I love teaching. I love interacting with students, and you
> could probably ask any single student that you stumble across and
> they'll tell you that it's just there and it's present, and it's there and
> it's present even online.

> **Carlos:** For me, one reward is it's a challenge, it's a new challenge.
> It's fun. It's great to find applications for the technology. It's a way
> of taking my courses and putting them in new and different formats
> and having wonderful pedagogical discussions with my colleagues.

Promotion and Tenure and DE

When asked about distance teaching and development in relation to the promotion

and tenure process, participants confirmed whether it held weight or not (see coding in

Table 3.8). Some participants connected their distance teaching to scholarship/research

in order to meet promotion and tenure criteria. Examples of this are evidenced in the

quotes that follow:

> **Victor:** I think it's very easy to find ways to associate, for example,
> the online work with their scholarly interests.

> **Carlos:** We have an ongoing study. We are both teaching face-
> to-face and a blended course in the same courses. So we're constantly
> comparing and contrasting those groups. So we've got research going on.

Table 3.7　　　　　　**Category: Subunit Faculty Reward (Intrinsic)**

Subunit Faculty Reward (Intrinsic)	No. of Responses (n=29)
emphasizing intrinsic rewards of DE teaching	10
stressing flexibility of DE for faculty	8
suggesting DE teaching enhances pedagogy	7
seeing DE teaching as reputation-enhancing	6
believing learning DE is an intrinsic reward	3

Table 3.8　　　　　　**Category: Promotion and Tenure**

Promotion & Tenure	No. of Responses (n=29)
confirming DE counts toward P&T in subunit	10
arguing DE counts little in P&T process	6
stressing importance of subunit culture	6
connecting DE teaching to scholarship/research	5
arguing DE does NOT count in P&T process	2

<u>Impact on Junior Faculty</u>

Dependent on how participants see junior faculty members impacted by involvement with distance education, responses are coded to reflect these opinions (see Table 3.9). Responses that imply junior faculty should not teach distance education are represented by several participants' comments below:

Horatio: I think it's kind of unfair to some degree that a lot of cool things that they're doing, and unique and different things -- unless they're extremely creative and derive some kind of research or something out of it, that it doesn't have a direct benefit to their situation.

Dillon: They're slaves. And I think it's a hard life for them. I do hear these complaints a lot.

Morrie: It is a real question in terms of a trade off, especially for junior faculty. Is it worth the extra investment to get into some of these distance education activities that will suck up a lot more time in the beginning when there is no additional pay off? And the payoff doesn't come from the tenure process. I don't think the reward structure is there yet. And that is a challenge for all of us.

<u>Commitment to DE</u>

In order to begin to understand how MSU values distance education, it is necessary to inquire about commitment to it. Thus, participants were asked to comment about distance education commitment, as evidenced in Table 3.10. Participants were free to provide examples of commitment, or argue whether or not their subunit was committed to distance education. Codes were designated accordingly:

Raymond: We don't try to, frankly. We advertise them in course listings and we get all of the enrollments that we want [LAUGHS]. So we don't put an effort into advertising it or promoting it.

Yaron: We see distance education as one means to expand the accessibility of MSU's courses to people, permit more people to take advantage of an MSU education, expand recognition and awareness of MSU's brand, and enhance revenue opportunities.

Faculty DE Training and Support

The literature demonstrates that faculty support and training are considered vital to distance education success (See Bartley, 2001; Dillon & Walsh, 2002; Halfhill, 1998; Olcott & Wright, 1995; Rockwell et. al, 1999; Schifter, 2005; Wolcott, 2003). Because of its perceived importance, participants at MSU were asked to comment about its effect on matters of interest, including faculty recruitment and pedagogy. Numerous participants suggested that distance teaching enhances pedagogy (See Table 3.11). Serena commented about young faculty, and Horatio discussed his own experience with distance teaching:

Serena: Because online teaching is dynamic, it gives new, young faculty a fantastic opportunity to try teaching course material in different ways. It allows these faculty an effective way to experiment with their teaching style and material presentation.

Benjamin: I think the first thing is -- to me it's exciting to use technology and to try to apply teaching principles to a new medium. It's challenging and it keeps your brain going, and you continuously have to think "how can I best get this information across to students, how can I actually see them learn, how do I evaluate whether they're learning or not?' I think that to me -- it is exciting. That is a reward in itself because it's kind of a challenge.

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Table 3.9 **Category: Junior Faculty**

Junior Faculty	No. of Responses (n=29)
indicating junior faculty do teach DE	11
implying junior faculty should NOT teach DE	10
stressing discouragement of junior faculty teaching DE	6
arguing junior faculty should teach DE	4

Table 3.10 **Category: Commitment to Distance Education**

Commitment to Distance Education	No. of Responses (n=29)
indicating subunit offers blended courses	9
indicating completely online Master's program	8
believing DE is important to MSU	6
demonstrating ongoing subunit DE commitment	3
admitting subunit NOT committed to DE	1
seeing subunit's DE marketing as DE commitment	1

Table 3.11   **Category: Faculty DE Training and Support**

Faculty DE Training and Support	No. of Responses (n=29)
suggesting DE teaching enhances pedagogy	11
emphasizing Chair's/Director's support	9
arguing pedagogy must be altered for DE	7
implying MSU faculty DE training is inadequate	3

As researchers, when we claim that our measures have construct validity, we are
essentially claiming that we understand how our constructs operate in theory, and thus we
claim that we can provide evidence that they behave in practice the way we think they
should. According to Trochim and Donnelly (2006), the researcher should provide
evidence based on observation or interaction (such as interviews). This section on
validity, therefore, illustrates how the data was used to minimize the subjectivity of the
researcher, provides examples of the coding process, and illustrates emergent themes that
cut across the coding answers included in the tables. These emergent themes, and the
patterns that were found among and across the three groups of respondents
(administrators, faculty, and support staff) will be discussed in detail in the next two
chapters.

Reliability

Reliability refers to the extent to which research findings can be replicated
(Merriam, 1998; Yin, 2003). Creswell (2003) posits that reliability generally plays a

minor role in qualitative research, and Merriam argues that reliability is problematic in the social sciences simply because human behavior is never static. And similar to what Nelson (1999) anticipated, in a single case study design (such as this project), reliability can be problematic because conditions will not be exactly the same in another university system. The investigator, therefore, looked to Merriam's advice "to keep careful records, and record in detail how data were collected and analyzed throughout the study" (p. 207). Yin (2003) refers to this as "maintaining a chain of evidence" so that an external observer can follow the derivation of any evidence, ranging from initial research questions to ultimate case study conclusions. If evidence is not lost through carelessness or bias, but is rather given appropriate attention in considering the facts of a case, "a case study also will have addressed the methodological problem of determining construct validity, thereby increasing the overall quality of the case" (p. 105).

Ethical Considerations

Ethics are important to consider when conducting research. For this study, steps were taken to ensure ethical standards were met. Permission for conducting the study was obtained from the Institutional Review Board (IRB) for the University of Michigan [IRB No. HUM00015782]. Institutional Review Board approval was deemed not necessary by the IRB at Michigan State University since UM IRB approval had been previously obtained. Via email, each participant was sent a copy of the study consent form (See Appendix E) so it could be examined beforehand, and to provide an opportunity for participants to ask any questions and receive clarification before the interview took place. The consent form included language stating the interview would be

tape-recorded, and that participants had the right to stop the interview at any time, if so desired. At the time of the actual interview, participants were again given the opportunity to ask questions or express any concerns they may have.

Participants were subsequently offered a copy of their original, signed consent form for their records. Signed consent forms are locked in a cabinet in the researcher's office.

Participants' real names and other identifying information are excluded from reported results, and false names have been assigned regardless of the participant's gender. Each interview transcript has been given a random identifier code in lieu of the participant's name to protect anonymity. All study interview recordings, transcribed interviews, and notes are stored on a password-protected thumb drive, which is locked in a cabinet in the researcher's office. Lastly, study results have been made available for MSU participants.

Limitations of the Study

The purposive sampling procedure utilized to examine MSU decreases the generalizability of the findings, thus the study is not generalizable to all higher education institutions that offer distance education. The researcher is limited in being able to generalize back to a population that includes *both* academic subunits that offer distance education and those that do not. In order to explore how MSU translates the value of distance education into faculty reward structures for such efforts, academic subunits that did not offer distance education courses at the time of the study were not examined because reward for faculty distance education efforts would not be a consideration. Thus,

the researcher maintained awareness of the selection bias of the case study as it related to findings, interpreting the findings through a selectional lens since only those who are engaged in distance education were interviewed.

Merriam (1998) points out, "The investigator as an human instrument is limited by being human – that is, mistakes are made, opportunities are missed, and personal biases interfere" (p. 20). However, in qualitative research, the researcher is an important component of the study. Qualitative research "recognizes the importance of the subjective and experiential knowledge that a researcher can bring to a study" (Nelson, 1999, p. 41). And although researcher bias is a concern often associated with qualitative studies (Yin, 2003), the researcher for this study attempted to employ sensitivity and responsiveness to contradictory evidence that arose during the data collection phase.

Chapter Summary

This chapter reported on the methods employed for this study. A qualitative case study was designed to understand distance education policy from the perspective of the internal stakeholders -- MSU administrators, faculty, and support staff. The next two chapters discuss the results from the extant text analysis of relevant mission statements and policy documents, and interview transcript analysis.

CHAPTER FOUR

**MISSION STATEMENTS, PRIORITIES,
AND DISTANCE EDUCATION**

As previously mentioned, twenty-nine MSU interviews were conducted for this

study beginning in October 2007. Fourteen of the MSU participants were faculty

members, eight were administrators, and seven were support staff from the five

departments who together handle the online and blended learning needs for MSU. The

data that resulted from analysis of the interview transcripts, in conjunction with analysis

of relevant mission statements, provide interesting findings that are discussed in detail in

this chapter. In the following chapter, a discussion of the interview transcript data

continues, in conjunction with analysis of relevant policy documents. Overall, the

findings indicate that MSU utilizes distance education to generate an alternative source of

revenue and remain competitive with other higher education institutions, but varies in

regard to faculty reward for, and commitment to distance education efforts across its

different academic subunits. At the same time, distance education is considered an

enhancement to the MSU mission due to its ability to provide outreach, increase student

access, and provide flexibility for both faculty and students.

The first section of this chapter begins with a discussion of the findings from the

extant text analysis of relevant MSU mission statements and the patterns that were

identified. Emergent patterns that resulted from the data analysis of the interview transcripts, and are related to mission, are also presented and discussed. Discussion of the findings from the extant text analysis of relevant MSU policy documents, the identified patterns from this analysis, and the remaining patterns that emerged from the interview transcript analyses follow in the next chapter.

The analyses from these sources draw on the work of Olcott and Wright's (1995) faculty support framework, Roger's theory about innovation, Slaughter and Rhoades' (2004) Academic Capitalism theory,[27] and St. John and Priest's[28] (2006) less critical view about "the shifting concepts of the public interest in higher education" (p. 271). Subsequently, the development of grounded theory based on the integration of data analysis and consideration of the theoretical perspectives mentioned above is presented. The chapter concludes with a summary and transition to Chapter Five: Discussion and Implications.

Extant Text Analysis

Merriam (1998) points out that "in qualitative case studies, a form of content analysis is used to analyze documents" (p. 123). She argues the "nature" of the data can be assessed rather than merely quantified by variety and frequency. For purposes of this study, content analysis was used to understand the 'communication of meaning' and identify patterns throughout relevant MSU mission statements and faculty reward policy documents.

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[27] Olcott and Wright's, Rogers', and Slaughter and Rhoades' theories are discussed in Chapter Two of this paper.
[28] Discussion of St. John and Priest's work is presented further on in this chapter.

Mission Statements

The overall mission statement for MSU was recently revamped, and was subsequently approved by The Board of Trustees in April 2008. The statement now reads as follows:

> Michigan State University, a member of the Association of American Universities and one of the top 100 research universities in the world, was founded in 1855. We are an inclusive, academic community known for our traditionally strong academic disciplines and professional programs, and our liberal arts foundation. Our cross- and interdisciplinary enterprises connect the sciences, humanities, and professions in practical, sustainable, and innovative ways to address society's rapidly changing needs.
>
> As a public, research-intensive, land-grant university funded in part by the state of Michigan, our mission is to advance knowledge and transform lives by:
>
> o providing outstanding undergraduate, graduate, and professional education to promising, qualified students in order to prepare them to contribute fully to society as globally engaged citizen leaders
>
> o conducting research of the highest caliber that seeks to answer questions and create solutions in order to expand human understanding and make a positive difference, both locally and globally
>
> o advancing outreach, engagement, and economic development activities that are innovative, research-driven, and lead to a better quality of life for individuals and communities, at home and around the world

Source: http://president.msu.edu/mission.php?mission

In order to assist with content analysis of the statement (and as a form of member checking), Table 4.1 presents the questions that were posed to the Office of the Provost (answers are summarized to the right).

Table 4.1   **MSU Overall Mission Statement Inquiry**

Question Posed	Administrator Response
How was the mission statement produced? By whom?	A review of the statement of mission was one of the recommendations connected with the recent MSU North Central Association re-accreditation ten-year cycle. The effort was led by MSU Provost Wilcox with involvement of Academic Governance. Final approval by the MSU Board of Trustees, April 2008.
In your opinion, what is the ostensible purpose of the statement? Might the statement serve other unstated or assumed purposes?	The Mission Statement (MS) places the University in the context of our core values as well as the realities of the 21st Century. It is a framing tool to guide, align, connect, and assure focus on both immediate accomplishments, as well as on the longer range. It is the platform from which our accountability to ourselves and to the public flows.
Which contextual meanings does the statement imply?	If you use "contextual meanings" as the vision framework for the 21st Century, the major contextual meanings for the MSU MS flow from the core values of connectivity, inclusiveness, and quality. More specifically, the contextual meaning of the MS sets forth MSU as: world class, public, research-intensive, land-grant value based, inclusive, connected across disciplines and with society's needs, an academic community engaged in 1) teaching/learning, 2) research/scholarship/creative endeavors, 3) service/outreach, and committed to making a difference locally and globally by advancing knowledge and transforming lives.
How does its content construct images of reality?	The MS explicitly recognizes the society of which we are part as both global and local, and as one with changing needs. The reality that flows from that construction requires approaching those needs in practical, sustainable, and innovative ways. The MS places the University in the context of world well-being, as well as national, local and individual economic well-being and quality of life.
Who benefits from the mission statement? Why? **Note: Answer does not appear to answer "WHO." Rather, it appears to address "what are the perceived benefits of the statement?"**	In a resource constrained environment, the beneficiaries from the mission statement are those efforts to link the University's external "brand" or "image" with the core values of connectivity, inclusiveness, and quality. It provides a succinct way to bridge between aspirations and realities, to stay focused on the societal needs for which there are not apparent solutions (e.g., energy), to "play" to our academic strengths as well as emerging opportunities, and it is a common ground to give personal as well as public meaning to the work that we do on campus and around the world in a way that allows both understanding and accountability.

The answers provided by the Office of the Provost helped identify the mission statement patterns indicated in Table 4.2. Michigan State University's Mission Statement does not explicitly refer to distance education, but does include outreach, and suggests the use of innovative means for delivering education to a modern society. And although distance education is offered by each of the seven subunits examined for the study, it was found to be explicit in only Subunit Two's mission statement, whereas outreach was specifically mentioned in not only MSU's overall mission statement, but in the statements for Subunits Three, Six and Seven as well. Two other patterns emerged among four of the subunits, including specification of teaching and serving the needs of the community.

Boldness by Design

In addition to MSU's revamped Mission Statement, the university has adopted a new strategic positioning known as "Boldness by Design." Boldness by Design (BBD), launched by President Lou Anna K. Simon in 2005, is the vision framework for MSU's strategic and transformative journey to become the model land grant university for the 21st century. In order to accomplish this, MSU has identified five strategic imperatives, as evidenced in the poster image in Figure 4.1.

Table 4.2   **Mission Statement Patterns**

PATTERN FOUND	MSU	ACADEMIC SUB-UNIT						
		1	2	3	4	5	6	7
Outreach is specified	X			X			X	X
Serving needs of the community is specified	X	X	X		X	X		
DE explicit in statement			X					
Teaching is specified		X		X			X	X

In President Simon's 'State of the University Address' given on February 8, 2007, she explained to her audience what BBD encompasses. The following is an excerpt from that address:

> Boldness by Design is a guide for defining MSU's path and our accountability to one another, to the people of Michigan, and to partners and investors, current and potential, around the world. Michigan State University accepts the mantle of leadership in renewing and redefining public trust in the role of land-grant universities to lead the nation and the world to a better tomorrow. We connect past and future, advancing the 21st-century application of core land-grant values -- quality, inclusion, and connectivity -- as the key to prosperity for a global society. Since this university's founding, land-grant has meant the resolve to be "good enough for the proudest and open to the poorest." It has meant bringing leading-edge knowledge to bear on the economic and social problems of the day in both theoretical and practical ways, developing a strong network of local partnerships, and being innovators in the development of academic programs. It has meant putting the public good ahead of individual special interests. With Boldness by Design, Michigan State University has committed to a metamorphosis that takes us from land-grant to world-grant. To be world-grant means to have the resolve to transform lives on campus, in Michigan, and around the globe by advancing knowledge gained in diverse settings in ways that magnify the benefits for all.

Source: http://boldnessbydesign.msu.edu

Figure 4.1   **Boldness By Design Poster**

Credit: Poster art courtesy of University Relations, Michigan State University

Under the umbrella of BBD, the university selected specific focus areas and key strategies for advancing the commitments of BBD's strategic imperatives (See Appendix D). Strangely, neither blended nor online education is mentioned among the many focus areas and key strategies identified, although numerous subunits offer blended and online learning, with some subunits indicating they bring in tremendous amounts of revenue from distance education enrollments. For example, Sterling admitted that distance education revenue supports 80% of his subunit's budget:

Sterling: Eighty percent of my disposable budget is virtual university, so that every dollar that we put into everybody's furniture in this building, into all their travel money, into all their registrations at conferences, into their little project needs here and there, everybody wanders in here and says, 'Can I have a little money to do all this?' That's where it all comes from, all the operating comes out of here.

Rather, the inclusion of the "use of technology" and "enhanced technology capability and support across units" are identified as BBD key strategies that *possibly* imply distance education. Hearn, however (as St. John and Priest (2006) point out), "clearly articulates the importance of aligning revenue-generating strategies with the strategic decision process within universities" (p. 275). And as discussion of the data from this study will indicate, distance education is a revenue-generating strategy that MSU subunits employ (sometimes out of necessity), whether it is showcased in BBD or not.

Emergent Patterns Related to Mission

Analysis of relevant MSU mission statements and transcripts from the interviews conducted for this study revealed the following patterns:[29]

- ♦ The transition from land grant to 'World Grant' is considered an MSU priority.

- ♦ Boldness by Design is considered an MSU priority by support staff members only.

- ♦ MSU's decentralized model provides relative autonomy for subunits' use of distance education.

- ♦ Distance education enhances the MSU mission, but is rarely explicit in mission statements.

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[29] These patterns are merely being introduced to the reader here as an overview of the ensuing discussion.

♦ Distance education increases student access, thus staying close to the land grant mission.

♦ Distance education is considered an important outreach tool that assists MSU's efforts toward meeting the goals of its mission.

♦ Distance education is viewed as integral to MSU's core mission.

Interview Transcript Analysis Findings

The first five interview questions were posed to participants of all three groups (administrators, faculty and support staff), and yield insight into the central research question: **How does Michigan State University translate its values regarding distance education into reward policy for junior faculty who teach via distance?** All participants were asked:

1) How does Michigan State University identify its priorities and unique characteristics?

2) Does distance education enhance the educational mission of the institution? Please elaborate.

3) Please explain the importance of distance education at Michigan State University.

4) How is Michigan State University's support for distance education reflected in the faculty reward policies?

5) What types of rewards do faculty members receive for teaching distance education courses?

MSU Priorities and Institutional Mission

In order to explore distance education's role at the institutional level, participants were asked about MSU's priorities and educational mission. Based on results from the interviews, twelve participants identified "World Grant" as an MSU priority, although

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five participants (representing all three groups) implied MSU lacks a clear World Grant

definition (see Table 4.3) when asked Interview Question One. Natasha, Horatio, and

Kenneth introduced the evolvement to World Grant when asked about MSU priorities,

but Wendy implied that the MSU president should be able to provide a clear definition of

what "World Grant by 2012" means since the president has worked at the university for a

long time and should be well aware of how to articulate the land grant evolvement. The

findings, therefore, suggest the term World Grant is familiar on campus, but that the

specifics of it are not.

Identifying World Grant as priority

Natasha: Rather than using the term land grant now, the talk is
about World Grant.

Horatio: The idea here is that by 2012 we will have established
ourselves as not -- our current terminology is land grant university.
The idea is to become a World Grant university.

Kenneth: We're going to go from being a land grant university to
being a World Grant university.

Implying lack of clear World Grant definition

Wendy: The new president who's been here for a long time, she's
not new to the university, she's focused on -- her slogan is "Land
Grant to World Grant by 2012." *So, whatever that means* [italics
added].

Xavier: They're calling it World Grant, which is just *completely
messing with the term* [italics added], but that's ok, that's the way
they want to do it.

Tomoko: World Grant is probably the next phase of that, *whatever
that means* [italics added].

Table 4.3   Identified MSU Priorities and Unique Characteristics

CODE	Total Responses	Admin.	Faculty	Support Staff
identifying World Grant as MSU priority	12	6	2	4
emphasizing land grant mission of outreach	10	2	6	2
emphasizing MSU's global mission	7	2	3	2
implying lack of clear World Grant definition	5	1	2	2
emphasizing decentralization of MSU	4	2	2	0
emphasizing land grant status	4	1	2	1
identifying Boldness by Design principles as MSU's priority	3	0	0	3
arguing MSU has priority of enhancing the student experience	3	0	1	2

Interestingly, only three participants identified Boldness by Design as an MSU priority, and none of them were administrators; rather, all three were support staff. This suggests that the importance of the BBD principles to meeting the "2012 World Grant" goal has not been stressed enough to, or is understood by administrators and faculty at the subunit level. When asked about MSU priorities, Horatio (a support staff member) suggested, "I think the easiest way to look at it is the whole Boldness by Design piece." Kenneth, another support staff member, identified BBD as an MSU priority and pointed out that it is a strategic framework for the institution: "I would say through Boldness by Design, which is the strategic framework that the current president disseminated."

At the time of the interviews, only two of the study participants (both support staff members) had the BBD poster (seen in Figure 4.1) displayed in their office, although the BBD "vision framework" was introduced in 2005. Wendy, a support staff

member, had the poster prominently displayed in her office, and pointed out that BBD

does not explicitly include distance education:

> **Wendy:** So that's really what we're about, and if you look behind
> you, are the Boldness by Design principles which are the latest
> strategic plan, and there's nothing explicitly in there about online
> learning or technology or distance learning, but it's woven in as
> an enabler, not explicitly though.

The researcher's initial impression, therefore, was that of distance education being

seen as merely 'a tool' for assisting MSU with achievement of goals.

Emphasizing land grant mission of outreach

Administrators and faculty gave greater voice to MSU's land grant status. For

example, six of the eight faculty members emphasized MSU's land grant mission of

outreach as an MSU priority, although only Helene, an administrator, connected the land

grant mission to distance education when specifically asked about MSU priorities in

Interview Question One:

> **Helene:** Part of the University's mission as a land grant AAU
> institution is to provide access to a broad public in terms of new
> knowledge generated, course and program offerings, etc. So from
> our perspective, the work that we've done in online learning since
> the Fall of '01 fits directly with the University's mission.

When additional interview questions were posed, however, there was widespread

agreement among participants about distance education's connection to MSU's land grant

mission, including its use as an outreach tool (see Tables 4.4 and 4.5). This implies

although distance education may not be viewed by participants as an MSU priority, it is

considered to be integral to the core land grant (now World Grant) mission. Emma and

Lawrence had the following to say:

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Emma: Sure, it does. If you look at it specifically from the standpoint of what we are doing for the citizens of Michigan as a whole, then distance education would fit that bill. Specifically, there are citizens in the community that do not have access to the university proper. Therefore, they can interact with us online.

Lawrence: DE, when you look at it from that perspective, it becomes integral to the core mission of the institution because if you are servicing people who cannot get to East Lansing, in this day-and-age, DE is one of the best tools that you have available to be able to give to individuals.

Slaughter and Rhoades (2004) argue that the notion of public good has been somewhat replaced by an academic capitalist knowledge/learning regime as colleges and universities integrate into the new economy. And although the revenue aspect of distance education enrollments at MSU lends credence to their theory, the data from this study demonstrate that faculty, administrators and support staff see "serving the public" as a higher priority for MSU. St. John and Priest (2006) then, ask an insightful question: "If government shifts responsibility for funding higher education from taxpayers to students and lenders, then who has responsibility for the public good?" (p. 247). Study participants indicate that MSU does.

St. John (2006), in his chapter on privatization and the public interest, argues that the introduction of market forces into universities changes the public image of the institutions, and to some extent undermines the social contract between public higher education and the citizens in states. Study participants from MSU, on the other hand, suggest a stronger connection has been made to citizens because of distance education's increased contributions.[30]

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[30] Proof of this can be found throughout the discussion in participant quotes, such as Horatio's comment on page 136.

In fact, none of the study participants identified revenue as an MSU priority when asked. Abby, for instance, emphasized the priority of providing outreach to the community: "I would say that a lot of it has to do with the land grant mission of the university and trying to stay true to that. Being involved in the community, service to the community, and outreach to the community is still a significant contribution." Lily sees outreach as an MSU core value: "I think first of all because MSU is a land grant university, many of its core values and its focus on clientele, its focus on outreach, is all land-based." And Maria stressed that outreach can take many forms:

> **Maria:** Land grant universities have that, so not only do faculty have to be concerned about teaching and research, but also outreach. Outreach is not something that is a third characteristic. You can do outreach teaching, you can do outreach research. You can do outreach service.

As Table 4.2 indicates, either outreach or serving the needs of the community were found to be explicitly stated in subunit mission statements, with *both* explicitly stated in MSU's overall mission statement. Therefore, participants' comments thus far, as indicated here and in Table 4.3, coincide with two of the identified patterns from the mission statement analyses.

Emphasizing MSU's global mission

Slaughter and Rhoades (2004) argue, "globalization is a central feature of the new economy" (p. 16), and study participants point to MSU's forays into this area. For instance, two of the eight administrators, three faculty members, and two support staff members indicated that MSU's global mission is considered a top priority. Cynthia specifically referred to MSU's study abroad program as a piece of the global mission, and argued that MSU sees it as a source of pride: "I think that MSU is very proud to be a

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global university and so that's certainly something that is stressed to us as faculty --

they're very proud of their study abroad programs."

Still, Horatio introduced the notion of the public good when he connected MSU's

global mission to serving the public by pointing out how it helps students become

successful, and enhances their MSU experience:

> **Horatio:** When you look at outreach efforts and the ways in which we
> impact both the communities locally, regionally, nationally and abroad --
> it's enhancing the student experience. All right, so what is that? Well,
> that's students here on campus; how can we make that more of an enriching
> and fulfilling experience really connected to what people need today in
> order to be successful, contributing people in society? But that's not just
> here in East Lansing or wherever they go -- that's kind of the mission that
> runs through whatever we do throughout the world. It's expanding that
> outreach and those impact activities.

Although MSU's mission does not include language about enhancing the student

experience, Kenneth, a support staff member, pointed out that the BBD principles do:

> **Kenneth:** "Essentially, what that [BBD] outlines is what are the
> characteristics of MSU that essentially position us relative to other
> universities or position us within higher education, in general. So,
> essentially, the tagline of that is that we're going to go from being a
> land grant university to being a world grant university. And there's,
> I think, four specific ways that they spell that out. Improving the student
> experience is the one that is most relevant to our unit. It's the one that
> we latch on to most.

Given that the Office of the President considers BBD to be the vision framework

for the institution, it comes as no surprise that the framework (See Appendix D) includes

the *specific* goal of enhancing the student experience, whereas in the MSU mission

statement it is implied as part of the *overall* social responsibilities of the institution.

Emphasizing decentralization of MSU

Sometime during the interviews, twelve of the participants emphasized the

decentralization of MSU. When asked specifically about MSU priorities, Natasha and

Madelaine emphasized the relative autonomy of subunits:

> **Natasha:** We are fairly decentralized, so while there is priority setting
> of course at the university level and college level, there is also a demand
> really that units do planning and setting priorities themselves also, and
> of course these need to align with the priorities up above.

> **Madelaine:** I think the bulk of it is done by individuals and by the
> departments. There are certainly policy directions that come from on
> high, but we're not generally obligated to do these things. We choose
> to do them.

Natasha and Madelaine's comments suggest that distance education efforts are

decided upon at the subunit level, and the study data presented so far indicate that most of

the study participants do view subunits' distance education initiatives as aligned with

MSU priorities and the institutional mission. For instance, William argued that distance

education's growth is attributable to innovations in the subunits, which in turn have

affected MSU's overall prioritizing:

> **William:** It's a more decentralized model, the way I see it. So the
> priorities themselves, in how distance education comes about isn't really
> top-down. Instead, it really develops from a lot of different areas, and
> the priorities themselves kind of come about in that way too. I think it
> is really unusual in that respect. When you are working with it there
> are lots of pockets of people who have done different things, and so the
> priorities have grown from a lot of different pockets rather than coming
> from a centralized sort of unit such that everything developed from one
> type of model. It's more that people began to do innovative things, so
> the way the entire program developed wasn't so centralized. So that kind
> of changed the way the whole system developed as well. I think the
> setting of priorities has been influenced by the fact that there are many
> different methods of how things happen on campus and that influences
> how things are prioritized as well.

<u>Distance Education and the Institutional Mission</u>

In Question Two, participants were asked whether they believe distance education enhances MSU's educational mission, and Question Three inquired about their views on its importance to MSU. Table 4.4 indicates that participants connected distance education to the institution's overall mission in a variety of ways, including as an enhancement to the mission, as an important outreach tool, and as beneficial for students. As evidenced in the table, eighty-three percent of the study participants believe distance education does enhance the mission. Dillon even argued that distance education has always been a part of the institution's mission because of its history with university extension: "Yeah, I think it does enhance the educational mission. And because our educational mission is founded on the whole idea of distance ed., of course it does."

Others commented on its flexibility and outreach capabilities. Carlos even suggested that MSU has an obligation to offer it because of its land grant tradition.

> **Carlos:** Oh, I definitely think it does. I think that especially at an institution like this, I think we're obligated to do it. And I think it's totally consistent with our mission to be doing distance education.

> **Madelaine:** Yeah, I do. I think it has great possibilities, and I try not to be negative about the schools that have popped up and do nothing but distance education.

> **Cynthia:** Oh yeah, definitely. I mean you can reach out to so many more people with distance education.

> **Maria:** I think it enhances it, it diversifies it, it complements it. We know increasingly, given changes in demographics of the workforce, that for a variety of reasons people need flexibility for asynchronous learning, for synchronous learning, for online learning, for distance opportunities. So it makes sense in terms of the educational needs of our constituents. So it is a very practical consideration.

Table 4.4   **Distance Education and the Institution's Mission**

CODE	Total Responses	Admin.	Faculty	Support Staff
believing DE enhances MSU mission	24	6	11	7
seeing DE as important outreach tool for MSU	9	3	4	2
arguing DE benefits students' schedules	7	3	3	1
arguing DE increases student access to MSU	6	1	2	3
connecting land grant mission to DE	6	2	4	0
arguing DE helps continuing education needs	3	0	0	3
believing DE is NOT part of MSU mission	1	1	0	0

One administrator, however, expressed belief that distance education is not part of MSU's mission. Joshua commented, "I think the online approach can create additional flexibility, but is probably not a necessary part of that more traditional educational mission." Joshua, although alone in his belief, does lend credence to the researcher's initial impression that distance education is considered 'a tool' for achieving institutional goals.

Participants from each of the three groups see distance education as a benefit to students, whether in terms of flexibility for student schedules, or increasing access to higher education. In fact, these perceived benefits both fall under the BBD rubric of enhancing the student experience, as pointed out earlier by support staff. Support staff also argued that distance education helps continuing education needs (see Table 4.4), such as in nursing.

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The notion of distance education benefiting student schedules is certainly not new to the distance education literature (Larreamendy-Joerns & Leinhardt, 2006); however, this study directly connects it to an institution's mission, that of being a World Grant institution. In fact, three administrators, three faculty members, and one support staff member argued that distance education enhances the educational mission of the institution because it benefits students' schedules. For example:

> **Sterling:** Yes, probably in a variety of ways, but the one that to me is most important is that I believe it makes it easier and more convenient and more appealing for students.

> **Serena:** For our students, it allows them to fit courses in very conveniently into their own work and academic and personal schedules. It definitely enhances students' freedom in course selection and pursuing their degrees.

> **Raymond:** There are probably two advantages for undergrads: one is the fact that if they have to work during the summer, taking an additional course or two (or maybe more than that) over a couple of years allows them to graduate on time as opposed to spending four and a half, or five years here.

Three support staff members, two faculty members, and one administrator argued that distance education enhances the institutional mission by merely increasing student access. Wendy argued that distance education is targeted at adult students who need access: "Well, it clearly is looked on as a way to provide access, especially to adult students or students that are, can't easily come here and have a campus experience." Benjamin pointed to student access:

> **Benjamin:** Absolutely. I think it really fits with what I had mentioned earlier in terms of 'taking the knowledge out' -- that distance education just increases accessibility for folks that typically don't have access to a large university. And it also really expands the expertise that you can bring into the university [for DE students] by accessing experts in areas outside of the university.

These examples, once again, demonstrate that study participants, in general, view distance education as integral to the institution's core mission.

Distance Education's Importance at MSU

In order to gain an understanding of the importance of distance education to the institution, each participant was asked to explain the importance of it at MSU. Again, the issues of student access and outreach arose (see Table 4.5), but revenue did not. Under Slaughter and Rhoades notion about academic capitalism, one would expect references to tuition revenue to be made at this point. Yet when asked about the importance of distance education to MSU, four of the administrators, rather, argued that distance education is important at MSU because it increases student access to MSU courses and programs. Helene even offered the following about the quality of her subunit's online Master's program: "The online program provides opportunities for people who cannot come to campus to enroll in what we believe are high quality master's level offerings."

Three of the faculty members and two support staff conveyed the same argument about access (see Table 4.5). For example, Kenneth argued:

> **Kenneth:** What distance education allows us to do is to offer degree programs to people that are, for example, tied to working in a specific place. They need education, they want education. Their profession demands it. The people they are serving demand it, but they don't have access to it where they are.

Table 4.5 **Importance of Distance Education at MSU**

CODE	Total Responses	Admin.	Faculty	Support Staff
arguing DE increases student access to MSU	9	4	3	2
arguing DE has gained importance at MSU	5	1	3	1
believing DE is important to MSU	5	1	2	2
seeing DE as important outreach tool for MSU	5	1	1	3
connecting land grant mission to DE	4	1	0	3
suggesting DE helps w/lack of classroom space	1	0	0	1

Lack of classroom space

Throughout the study, participants also commented on MSU's lack of classroom space for students, and when asked to explain the importance of distance education at MSU, one support staff member suggested distance education helps with the classroom space dilemma:

> **Horatio:** Well, outside of the obvious things like we can't accommodate any more students here, we have no more room on campus. Our residence halls are full. We're at capacity. We have no more room. So the central idea initially and to some degree it still is, is the idea that by being able to accommodate people via distance or online learning, we can reach more people and be able to help meet their learning needs in that way who otherwise can't come here.

Therefore, the data thus far demonstrate that study participants, in general, view distance education as a means to serve the public good more than as an alternative form of revenue. This suggests a *lack of shift* towards the previously discussed academic

capitalist knowledge/learning regime proposed by Slaughter and Rhoades, although the

offering of distance education does represent a marketlike activity.

<u>Connecting land grant mission and distance education</u>

Seventy-two percent of the study participants connected MSU's land grant

mission to distance education sometime during the course of their interview, with one

administrator and three support staff members emphasizing this connection when

discussing distance education's importance to MSU. Joshua and Yaron had the following

to say:

> **Joshua:** I think it's becoming increasingly important, part of which
> does get back to the land grant philosophy, particularly within a
> professional school like ours where we historically have had a
> commitment to trying to bring new knowledge and be engaged with
> the professional communities that fall within our area of study.
> This becomes, I think, a very valuable resource for trying to connect
> to those who are typically working professionals that are looking at
> life-long learning. And I think this is a more realistic way of bringing
> the educational resources of the school to a broader constituency.

> **Yaron:** We see distance education as one means to: expand the
> accessibility of MSU's courses to people; permit more people to take
> advantage of an MSU education; expand recognition and awareness of
> MSU's brand; and enhance revenue opportunities. It also is a way to
> help all of us remain aware of what we are in broad markets, so it is
> an important means by which to enhance our land grant (now "World
> Grant") purposes. These have always been the purposes, even when
> distance education was all face-to-face, with MSU faculty going out
> to various remote locations. Now it is even more powerful with online
> means of delivery.

As Joshua and Yaron's comments suggest, distance education is expanding

MSU's reach into communities both near and far. But Yaron also points out the

importance of marketability of distance education at MSU. In addition, Yaron emerges

as the first participant to point out the enhanced revenue opportunities of distance

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education offerings at MSU when asked Interview Questions One thru Three. Still, participants' views, as indicated thus far, suggest that serving the public good (by means of increasing student access via distance education, connecting the land grant mission to distance education, etc.) remains an MSU priority.

Administrators and support staff were specifically asked: **Does MSU's land grant status have any bearing on the level of importance it places on distance education?** Seven participants connected MSU's land grant status to distance education when asked this question, but one administrator, Tomoko, argued the opposite: "No, because if that were the case, then we would be far more technologically sophisticated on this campus than where we are." Tomoko had acknowledged early on that the land grant mission was important to the institution, but here she expressed frustration with what she sees as a top-down approach from an institution that claims to be decentralized. And Sterling implied that reasons other than serving the public good are behind distance education's presence at MSU: "No, I think it fits into the land grant philosophy to do that kind of education, but I don't think that's the driving force for it."

When asked the same question, however, support staff failed to suggest anything outside of serving the public good. Rather, they: 1) implied that distance education attracts more students to MSU; (2) suggested distance education is a contemporary means to achieve the land grant mission; and 3) expressed belief that distance education complements the traditional MSU mission. For instance, Yaron and Kenneth highlighted distance education's relevance at MSU:

> **Yaron:** The combination of global interests and land-grant philosophy
> had a lot to do with MSU's very early interest in distance education --
> it wasn't something new and different, just new forms of doing things
> we had been doing all along.

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Kenneth: I think the ways we've chosen to do it [DE] show the character of our mission of being a land grant -- being a land grant institution is very much a part of our DNA. It's very much a part of who we are. So how we've chosen to carry out blended learning I would say is very much influenced by the general spirit of that.

Distance education is already important

Although five of the participants argued that distance education has gained

importance at MSU, another five (representing each of the three groups) believe it is

already important at MSU. Two faculty members' comments are as follows:

Serena: Distance education is important at MSU for a couple reasons. First, it allows students to better make connections among the course material and real world as they are learning it. Second, it is a convenient way to learn for many students, particularly ones with busy courseloads during the fall and spring semesters, busy summer schedules, or concerns about commuting and associated costs.

Carlos: One way I'd gauge the importance of it to the institution is the fact that there's tremendous support for this.

Subunit Mission Statements

In order to gain a sense of distance education's place in subunits, administrators

and faculty members were asked the following targeted questions:

♦ Are you aware of a specific mission statement for the subunit, separate from the Institution's mission statement? If so, does it include distance education?

♦ To what extent do you think faculty were involved in the development of the statement?

It is important to note here that the extant text analysis of subunit mission

statements indicated that all but one of the subunits have their own mission statement.

The one subunit that does not has its own values statement instead, but falls under the umbrella of the College of Social Science's mission. In addition, the lack of an explicit reference to distance education was apparent in all but one of the subunit mission statements examined, and in MSU's overall mission statement (as indicated in Table 4.2).

Table 4.6 illustrates coding of the more common responses from administrators and faculty regarding the presence of a subunit mission statement. All but one of the eight administrators, and five of the fourteen faculty members confirmed the existence of a mission statement for their subunit. Nine participants, however, admitted they were either unaware or unfamiliar with their subunit's mission statement, including oddly, Raymond, an administrator who is not new to the subunit and is from a subunit that has its own mission statement: "I don't know if it is written anywhere, and I haven't checked our Webpage, so I don't really know." Still, this administrator's lack of knowledge is not enough to dispel one of the aspects of what the conceptual framework for this study indicates -- that administrators play a major role in mission formation, language, and changes to it.

More than half of the faculty members interviewed, however, did admit a lack of awareness regarding a mission statement for their subunit. Abby even offered an embarrassed laugh when asked. She said, "I am sure there is one, but I couldn't tell you what it is." [LAUGHTER]. This could be due in part, however, to the statement's absence on her subunit's website.

Table 4.6   **Subunit Mission Statements**

CODE	Total Responses	Admin.	Faculty
confirming subunit has its own mission statement	12	7	5
admitting lack of awareness re: subunit mission statement	9	1	8
arguing DE is implicit in subunit's mission statement	7	3	4
believing DE is not mentioned in mission statement	8	3	5

Given that a number of participants admitted they were not familiar with a mission statement for their subunit, insightful answers regarding (and/or confirmation of) distance education's inclusion were expected to be lacking. One administrator, however, emphatically claimed distance education was stated explicitly in his/her subunit's mission statement: "Yes. We do talk about technology and distance education as part of what our mission is. *Yeah* [italics added]." Yet, although the extant text analysis of relevant subunit mission statements indicated one subunit mission statement did explicitly include distance education (See Table 4.2), it was not the subunit of this administrator.

Three administrators and four faculty members did argue that distance education is implicit in their respective subunits. For example:

> **Roger:** I think in the education part it is implied. We are doing outreach seminars as well. So it is implied, but it is not specific regarding distance education.

> **Natasha:** When this was written we weren't doing things like this. This is not brand new language. So it was written broadly enough that it certainly encompasses that, but that was never a specific focus.

Joshua: It does not specifically address online education, but it states as one component of the Strategic Agenda that we would be engaged with the professional community. And so the online education then becomes a way of making that happen.

Benjamin: Yeah, I think the terminology is "using a variety of learning technologies" and the implication is very much distance education.

Their comments support the third pattern that was identified from the analysis of the mission statements -- only one subunit's mission statement explicitly states distance education. Their comments also lend weight to the researcher's initial impression of distance education being viewed as 'a tool' to help MSU achieve its mission.

The following comments suggest perhaps a re-examination of subunit mission statements is needed. For example, three administrators and five faculty members did not express *certainty* regarding distance education's inclusion in their respective subunit's mission statement; rather, they *guessed* at its inclusion, as evidenced in the following quotes:

Natasha: Not specifically, I don't think so.

Cynthia: Yes we have one, but I do not know if it includes distance education. I don't think that it does.

Sterling: No, I don't think it's in the mission statement.

Serena: I don't think distance learning is incorporated into it.

Emma: I do not seem to recall anything about distance education in it.

Raymond: I am pretty sure it does not because we haven't worked on any kind of mission statement in the last three or four years, since we got involved [in DE].

Two participants implied that distance education should be in their subunit's mission statement. Carlos commented, "I'm not sure if it includes distance education or

not. I would hope it would." Xavier maintained, "I don't know whether or not it has the words 'distance ed' in it yet. It will."

When asked, nine participants stressed active faculty participation in the development of the mission statement for their subunit. These participants were stressing the point that faculty members are actively involved in decision making. The following illustrate participant views:

Roger: We just went thru an internal review of the department and all of the faculty who were working last spring were working on doing this.

Joshua: They were very involved. We did it through a series of open deliberations and review and refinement involving all of the faculty.

Lawrence: The mission statement – very much involved.

Carlos: Oh definitely. The whole department always is involved.

Morrie: Oh, very much so. Yeah, yeah. I mean it was done by the faculty.

Helene: A number of faculty were involved. It's usually written by the members of the faculty advisory committee.

Tomoko: Oh, *completely* [italics added]. Totally involved.

Seven respondents expressed *belief* in high faculty involvement, but did not *stress* it when asked about their respective subunit. For example, Madelaine guessed, "I *think* [italics added] they were involved a lot," and Benjamin, an associate professor, declared, "They *pretty much* [italics added] wrote it."

Teaching was specified in four of the seven subunits' mission statements, and was the fourth pattern identified from the extant text analysis. Teaching was found to be absent, however, from MSU's overall statement (as indicated in Table 4.2); however, the

Office of the Provost indicated that the contextual meaning of the statement includes

teaching and learning (see Table 4.1). Logan (1995) would argue, it seems, that its

absence is due to the classic tradition of research institutions -- that of a two-tiered

system in which research prevails and teaching is a relatively unimportant lower tier. In

line with Logan's idea about a two-tiered system, throughout the interviews, several

participants commented on teaching's relative little value/unimportance at MSU. Emma,

for instance, emphasized the importance of research over teaching, although teaching is

emphasized in her subunit's mission statement. She also indicated her subunit lacks a

distance education teaching mandate when she commented:

> **Emma:** "I could get promoted if I published a lot and got a lot of
> research dollars and didn't do a thing with online education. I could
> get promoted that way and would get promoted that way. On the
> other hand, if I were just doing online stuff and just focusing on
> teaching, I wouldn't get promoted that way. So it's a very small
> part of what is valued at the University, which is a reflection of
> the overall squeeze that is being put on universities as a whole.

Benjamin pointed out that teaching takes up most of faculty members' time in his

subunit: "Everyone has a little bit different configuration of the load, but by and large,

teaching time is the greatest percent time." Teaching appears to be implied in his

subunit's mission statement since great emphasis is placed on serving the needs of

students and the community through the subunit's educational efforts. Another subunit's

mission statement, however, does indicate research, teaching, and service, but under the

umbrella of MSU's land grant mission (which, again, does not explicitly include

teaching). It is important to note that this subunit also fails to include its mission

statement on their website, for reasons unknown.

The fourth subunit to include teaching in its mission statement actually lists teaching before research, suggesting it is a priority for the subunit and is connected to scholarly efforts. This was confirmed by Carlos who emphasized his (and a junior faculty member's) success with connecting the two:

> **Carlos:** We have an ongoing study. We are both teaching face-to-face and a blended course for the same courses. So we're constantly comparing and contrasting those groups. So we've got research going on.

And Victor, a senior faculty member from another subunit (and who is a big proponent for online education), suggested that connecting online teaching and research is relatively easy for faculty members: "I think it's very easy to find ways to associate, for example, the online work with their scholarly interests."

Chapter Summary

This chapter has discussed the patterns identified in the mission statements in relation to interview transcript findings. What the next chapter will demonstrate is that faculty distance education efforts at MSU are not always rewarded in a formal or consistent manner, and that subunit culture greatly affects faculty reward structures. The emergent patterns, therefore, from the analysis of mission statements and interview transcripts that were introduced in the beginning of this chapter will be discussed in Chapter Five in connection to the patterns that emerged from the policy document analysis and continuation of interview transcript analysis.

CHAPTER FIVE

POLICY DOCUMENTS, FACULTY REWARD,
AND DISTANCE EDUCATION

The conceptual framework presented in Chapter Two (Figure 2.5) provides a conceptualization that considers the evolution of distance education and its place in U.S. higher education institutions. As the framework suggests, factors have been found to influence faculty to partake in distance education initiatives, including that of intrinsic and extrinsic rewards. The data from this study indicate the following patterns regarding faculty rewards for distance education efforts at MSU.

Emergent Patterns Related to Policy

Analysis of relevant MSU policy documents, and transcripts from the interviews conducted for this study revealed the following patterns:[31]

- ♦ Online distance education brings in an alternative revenue source, similar to Slaughter and Rhoades' idea of Academic Capitalism.

- ♦ Faculty reward for distance education efforts varies across the subunits.

- ♦ Subunits lack written distance education policy for faculty reward.

- ♦ Distance education teaching and/or development's weight in the promotion and tenure process varies among subunits.

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[31] These patterns are merely being introduced to the reader here as an overview of the ensuing discussion.

♦ Subunit culture plays a major role in how distance education is valued by the subunit.

♦ Subunit commitment to distance education varies.

♦ Faculty receive intrinsic rewards for distance education efforts.

♦ In general, junior faculty are not encouraged to engage in distance education development and/or instruction.

Policy Document Analysis

Examination of MSU's overall policies regarding faculty reward, and relevant subunit reward documents yielded five patterns, as indicated in Table 5.1. Patterns found include: 1) whether distance education is specified or not; 2) if distance education teaching and/or development's applicability in promotion and tenure is specified; 3) whether research on a faculty member's teaching is a performance indicator; 4) if the importance of both teaching and research is specified; and, 5) whether technology use is indicated as a performance indicator. It is important to note that MSU faculty members are not in a union; rather, faculty reward policies (or structures), especially in regard to distance education, generally vary by subunit. Several participants emphasized this variation during their interviews:

> **Joshua:** I think that's probably an evolving issue. I think that's one of those areas that has primarily been left at the unit level.

> **Lily:** Oh, it's variable. It's extremely variable.

Table 5.1   **Policy Document Patterns**

PATTERN FOUND	MSU	ACADEMIC SUB-UNIT						
		1	2	3	4	5	6	7
Specifies blended or online teaching and/or development			X				X	
Specifies blended or online teaching and/or development count toward P&T								
Specifies research on faculty member's teaching as a performance indicator			X					
Specifies the importance of <u>both</u> teaching & research	X	X	X		X	X		
Indicates technology use as performance indicator		X	X	X		X		

Yaron: They've [subunits] used reduction of teaching loads, which is an indirect way of buying out time. They've used overload pay, they've used summer pay -- lots of different [formal or informal policies and structures]. They've used, 'I'll give you two more teaching assistants this year and by the end of the year I want you to have these two or three courses online.' I mean whatever it is, each discipline operates their budgets a little differently because largely, the driver there is grant income and the scale of grants.

Maria: I think that [faculty reward] is as varied as the units are.

As Yaron suggests, MSU subunits vary in terms of formal versus informal reward for faculty distance education efforts. In addition, the data from this study demonstrate that the identified intrinsic versus extrinsic rewards received vary as well. The next two

sections of this chapter, therefore, focus on intrinsic and informal rewards for faculty

distance education efforts before a more detailed policy discussion ensues.

Intrinsic Rewards

The literature demonstrates that intrinsic rewards can be highly valued by distance

education faculty (Baldwin & Chronister, 2001; Dillon & Walsh, 2002; Donovan, 2004;

Gappa et al., 2007; Johnson & DeSpain, 2001; Olcott & Wright, 1995). Therefore, it was

appropriate to ask MSU participants about their views on intrinsic rewards in relation to

distance education teaching and/or development.

Table 5.2 indicates that some of the participants commented about the intrinsic

rewards of distance teaching, whether this meant placing emphasis on them (which only

faculty members do), seeing distance teaching's flexibility as a specific intrinsic reward,

or believing the sheer act of learning to teach via distance is an intrinsic reward. The

quotes included below, therefore, are indicative of what the conceptual framework and

associated categories that are presented in Figure 3.2 suggest about faculty members:

many faculty members highly value intrinsic rewards received for distance education

efforts; faculty want a clear understanding of the time needed for such efforts; and a

certain level of comfort with the technology is desired, but is also found to be exciting to

learn. Gayle, a junior faculty member, emphasized the intrinsic value of distance

teaching, and Abby, a full professor, connected it to student learning:

> **Gayle:** I love teaching. I love interacting with students, and you could
> probably ask any single student that you stumble across and they'll tell
> you that it's just there and it's present, and it's there and it's present even
> online.

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Table 5.2 **Intrinsic Rewards of Teaching Distance Education**

CODE	Total Responses	Admin.	Faculty	Support Staff
emphasizing intrinsic rewards of DE teaching	8	0	8	0
stressing flexibility of DE for faculty	4	2	2	0
believing learning DE is an intrinsic reward	3	1	2	0
seeing DE's flexibility as intrinsic reward	2	1	1	0
stressing intrinsic rewards most important	2	0	1	1
arguing he/she receives NO intrinsic DE rewards	1	0	1	0

Abby: That has been an interesting and rewarding experience -- to see how the learning process is happening between the students -- in a way that in the classroom you don't have. You are not monitoring their emails and so forth, but here they are required to chat in the chat rooms that are part of the course. So we are able to see everything. That is rewarding in terms of getting to see that, even though I don't ever get to see them [in person] and answer their questions in class like in traditional classes, which I enjoy. But I have this other way of getting involved in their learning process.

Roger, another junior faculty member, emphasized the intrinsic value of learning

to teach distance education, and acknowledged the importance of the experience -- the

aspects of time and comfort level:

Roger: The reward for me intrinsically, I think, was actually for me to learn if I would like teaching online, what is demanded. If you do not do it, you can never really have an evaluation or idea of how much time you need for it. Can I communicate properly with the students? And I think it was for my teaching career development that it was really important to teach online, and I think that was the main driver to me accepting to teach an online class.

Carlos, a big proponent for distance education, emphasized the intrinsic value of its challenge. In addition, Carlos and Morrie both view enhanced pedagogical discussions with colleagues as an intrinsic reward:

> **Carlos:** For me, one reward is it's a challenge, it's a new challenge. It's fun. It's great to find applications for the technology. It's a way of taking my courses and putting them in new and different formats and having wonderful pedagogical discussions with my colleagues.

> **Morrie:** Another reward is for people who like using new tools. There's the chance to work with other people who like using new tools, and engaging in conversations around pedagogy related to the use of those tools.

In fact, participants from each of the subunits except one *emphasized* the intrinsic rewards associated with faculty efforts in this area. Victor, a senior faculty member, exclaimed, "For me, there have been enormous intrinsic rewards." Lily commented about the intrinsic reward of peer recognition:

> **Lily:** There's a lot of recognition paid to people who do a good job online, I think. And then we have lots of internal meetings and presentations, and people can gain a sense of self-efficacy that you're being appreciated and acknowledged for what you're doing online.

Benjamin, a faculty member from a subunit that embraces technology and distance education, was absolutely exuberant when discussing intrinsic rewards. In addition, during the course of his interview, Benjamin also commented on the tremendous support he and his colleagues in his subunit receive for distance education efforts. Again, participant discussion of intrinsic rewards reflect the interplay of faculty members, reward, and technology that appears in Figure 3.2.

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Benjamin: I think the first thing is -- to me it's exciting to use technology and to try to apply teaching principles to a new medium. It's challenging and it keeps your brain going and you continuously have to think 'how can I best get this information across to students, how can I actually see them learn, how do I evaluate whether they're learning or not?' I think that to me is exciting. That's a reward in itself because it's kind of a challenge. I think the second reward is the fast-paced, changing content all the time. You are continuously having to update, and the internet just allows you such an unbelievably rich place to mine for information. So that's a lot of fun. And then I think the other reward is that of student excitement and learning. The students love it and they give me a lot of very positive feedback; I personally feel more connected to students.

One lone faculty member, however, claimed that he receives *no* intrinsic rewards from teaching distance education, even when asked twice. Thomas merely said, "No, nothing in particular." This contradiction to other participants' views on intrinsic rewards does not, however, indicate anything significant. Thomas did not express dissatisfaction with distance education throughout the interview, nor did he hint at satisfaction. He merely answered the question without anything to add.

Support staff members commented very little about intrinsic rewards associated with distance teaching, perhaps because of their lack of instructional duties. And neither support staff nor administrators *emphasized* intrinsic rewards, perhaps due to a lack of communication between faculty and the other two groups on the importance of the intrinsic benefits of distance teaching. In fact, Roger's (1983) notion about the diffusion process of communication suggests that without proper communication, the benefits of an innovation may be unknown to non-users. In addition, only one of the administrators interviewed for the study indicated he/she has taught via distance, so the other administrators may not view intrinsic rewards as a motivator for distance teaching, but rather, believe extrinsic rewards are more important to faculty.

Both administrators and faculty members did, however, comment about distance

teaching's flexibility. For example, four participants *stressed* how flexible it is. Natasha

emphasized how online teaching's flexibility helps with faculty schedules, and Morrie, an

administrator who also teaches via distance, suggested that distance education's

flexibility is quite motivating for faculty:

> **Natasha:** Well, if you're teaching a class online, just like the students
> aren't tied to the classroom at particular times of the day and week,
> neither are you. So there is much more flexibility for faculty scheduling,
> for themselves, if they're teaching online.

> **Morrie:** One of the things that I think motivates some of the faculty
> to get involved in distance education is that they have more control
> over their academic life and how they spend their time.

Cynthia admitted that distance teaching's flexibility helps her feel more

productive in other areas: "Well, the benefit that I get from teaching online is the

increased flexibility, so I feel like I'm more productive." Thus, Thomas' admittance

about a lack of intrinsic rewards does not dispel what the literature suggests, or the

evidence provided from other study participants in that intrinsic rewards for distance

education efforts are highly valued by MSU faculty members.

Informal Rewards

According to Nelson and Spitzer (2003), the value of informal rewards as

employee motivators is increasing for two reasons. They argue that traditional rewards

such as compensation and promotions -- although still important -- are becoming less and

less effective in motivating today's employees to achieve high performance. They also

believe informal rewards are effective and highly desired by today's employees.

Michigan State University's Human Resource Department appears to agree. The

department emphasizes the benefits of informal rewards on its webpage

(*http://www.hr.msu.edu*) where it lists four principles that MSU employees can consider

when determining how best to deliver a particular reward:

- ♦ **If-Then Principle** -- If an employee's performance meets or exceeds your expectations, then reward the employee.

- ♦ **ASAP Principle** -- Give the reward as soon as possible after the performance has occurred.

- ♦ **Variety Principle** -- The reward should keep changing to retain its effect. The same reward given multiple times will lose its impact.

- ♦ **Sometimes Principle** -- A "sometimes" reward is given only some of the time when an employee's performance exceeds your expectations. Employees who are rewarded periodically when they perform well are likely to continue to perform well in the absence of rewards.

The site also offers numerous ideas, and an expansion of options for informal

employee rewards. For example, the list includes:

- ♦ Letter of appreciation with copies to the employee's file and to top administrators
- ♦ Publicity – mention in newsletter/MSU News Bulletin/Local newspaper
- ♦ "Behind the scenes" Award for those not normally in the lime light
- ♦ Invitation to "higher-level" meetings
- ♦ Offer to mentor the employee
- ♦ Opportunity for advanced training/attendance at seminars or conferences
- ♦ More autonomy to determine how the work is completed
- ♦ Additional staff for project development
- ♦ Job sharing
- ♦ Work off-site
- ♦ Flexible work schedules
- ♦ Upgrade of computer
- ♦ Regular recognition lunches
- ♦ Cash bonus – with taxes pre-paid

Interview participants indicated that several of the MSU subunits examined for this study offer informal rewards for distance education development and/or teaching. Horatio pointed out that informal rewards for distance education faculty can include graduate student assistance with distance education course development:

> **Horatio:** Faculty look at distance education and say, 'Okay, this is a way in which I can bring revenue into my department, which then allows me to do any number of things that are important to me -- whether it's hiring more faculty, hiring more grad TAs, whatever it might be. Oh boy, we can get that microscope I've always wanted.' Whatever the motivation, they see it as kind of a means to an end.

Benjamin indicated that distance education mentoring in his subunit is mostly of an informal nature: "Some of it's formal, some of it's informal; probably the majority of it's informally done."

And Emma emphasized the benefits of informal distance education reward. She suggested that her involvement with distance education will likely carry some weight in the review process, and she also talked about how distance education has enhanced her reputation on campus:

> **Emma:** It is an intangible thing. Looks will go by and I will be completely unaware of it [but others notice]. Then I will be in some sort of a social situation and I will be introduced to someone and they will then say, 'Oh, you are the one that is really involved in online education.' That's how it comes up. It is random -- it certainly is not consistent. It comes up at times when I least expect it. So because of that I think I have some sort of profile around the University. I have no way to quantify it or measure it, but I do think it is going to help me next year when I go up for full professorship. To actually put a number on it or a firm value, I cannot do that.

What Emma suggests though is that a lack of clear criteria exists for promotion to full professorship. The next section of this chapter provides data that helps explain why subunits, like Emma's, lack distance education policy.

Continuing with the present discussion about informal rewards, Madelaine, Sterling, Serena, and Kenneth all pointed out that 'reputation-enhancement' can be a benefit of faculty distance education efforts:

> **Madelaine:** Well, I think one of the rewards is being viewed as an expert.

> **Sterling:** Less tangible, I think those people who have been involved in DE projects have gained 'reputationally' in the university.

> **Serena:** I think an informal reward is the recognition within the department, and at large in the university.

> **Kenneth:** They [DE faculty] basically, I think, just get the social benefit of that. Everybody knows they're an earner, like people that bring in grants, right? So you get -- you can derive social benefits, in terms of how resources are spent or what input you get into various things, based on the fact that you're an earner.

Dillon, a support staff member who regularly interacts with distance education faculty, also sees distance education development and teaching as reputation-enhancing: "I think that there is always a boost to their reputation; they become quite well respected for teaching online."

Patricia talked about a more formal reward structure that existed when distance education was new in her subunit, but suggested a more ad hoc, informal reward system is more the norm now:

> **Patricia:** I actually think the formal reward structure that was in
> place for several years has sort of become diffuse. That is, I think it
> sort of depends on who the person is as to whether they need certain
> rewards or not. I think probably if I say, "I need to have a computer
> and I need a certain amount of money or something to hire somebody
> to help me," probably there would be some eagerness to help make
> that happen.

As MSU's list of informal rewards suggests, publicity/employee recognition in a

subunit newsletter can also be considered an informal reward that conveys appreciation.

William, for example, mentioned that a recent issue of his subunit's newsletter included a

section devoted to distance education, and included a thank you to him for his efforts in

this area:

> **William:** I know that there is a commitment to distance education.
> For example, they put out a newsletter that goes to every single alum,
> and actually we should send you a copy of it because it has featured
> a section that talks about distance education. Our Chair gives a big
> thank you to me in it, and I think it's great that they put it in a newsletter
> and send it to alumni.

What the participants indicate is that informal reward for distance education

efforts appear in various forms among the subunits, and that no one system is universal.

Michigan State University Faculty Reward Policies

Examination of MSU faculty reward policies indicates that only Subunits Two

and Six have policies that specify blended or online teaching. These are absent from

MSU faculty reward policies as well. Yaron, a study participant who interacts with

administrators at all levels, suggested subunit culture plays a key role in policy variation:

Yaron: At the local unit level it's going to depend a lot on chairs and deans and what they want to -- the kinds of things they want to incentivize to their faculty, the kinds of behaviors and productivity and production that they want to incent. It depends, as we talked before, on the personality of the leader, whether they see a chance to make strategic changes to the programmatic process, or whether they just view themselves as a caretaker that tries to keep their faculty as happy as possible, as individuals. So we have chairs and deans who think very programmatically; they align all their internal processes and policies and practices to support their strategic intents. They see problems, they see barriers that pop up, and they work to solve them effectively. And then we have others that may push hard all the time but they don't ever do anything to remove barriers, they don't do anything to change the local operating environment or the local culture, and, so it [DE reward] is highly differential at the policy level, not well-supported but you find pockets inside the institution where it's highly supported.

Yaron's comments support what the conceptual framework in Figure 2.5 suggests in regard to administrators. At decentralized institutions like MSU, administrators are in charge of their subunits, and therefore lead subunit commitment to distance education. In addition, administrators exert great influence over both the formal and informal reward structures in their respective subunits. Subunit commitment to distance education, and whether or not it is seen as vital revenue for a subunit's survival are two factors that support Yaron's assertion above. These factors, and more discussion on subunit culture, can be found further on in this chapter.

Online tuition revenue rule explained

The amount of tuition revenue that MSU units receive from their distance education enrollments is something that was repeatedly pointed out, and commented on by participants. In order to understand the complex nature of the tuition revenue structure at MSU, David Gift, Vice President of Libraries, Computing and Technology, was asked to elaborate on tuition revenue allocation. He explained that some new, fully

online courses (usually part of a new degree or certificate program) are offered in what MSU sometimes calls a "revenue-based initiative" (RBI) mode. RBIs involve a special arrangement that was created years ago as an inducement to get units to branch out and offer online courses. This may lend credence actually to E. P. St. John's argument (personal communication, December 31, 2008), "that public universities seek revenue in support of mission." At MSU, academic units directly receive 75% of the earned tuition for off-campus student, online, credit-bearing enrollments, and the Provost receives the other 25%.

Gift further explained that normally academic units at MSU do not receive *any* direct tuition earnings. Rather, all tuition earnings go into the General Fund pot and the Provost decides how much each college gets out of this pot, which also includes the State appropriation (and the deans decide how much each subunit receives). Gift pointed out, "There is no simple way to think about this as a strict proportion of tuition; it differs for every college, and it differs for every unit and every program in every unit" (D. Gift, personal communication, June 15, 2008). Gift suggests that if a unit decides to offer an existing course in a fully-online mode (i.e., not as part of a brand new program, but just as a new section), the tuition earnings typically are treated the same way as a traditional or blended course is, as opposed to the fully online RBIs. Thus, it is possible to have a fully online course treated as an RBI or as regular tuition mode. Lastly, Gift suggests there are surely even more exceptions and modes at MSU given the complex nature of revenue allocation (D. Gift, personal communication, June 15, 2008).

Seventy-five percent rule as incentive

Interview participants commented about the online tuition rule. Tomoko, for example, indicated she sees the 75% online tuition rule as the *only* MSU distance education reward: "The only thing that they're doing is -- if we offer things online or off campus or whatever, they give part of the money back to us." And three participants, one from each group, stressed the benefits of the 75% rule:

> **Sterling:** Seventy-five percent of the tuition revenue from that student comes back in the department, and that in turn as an administrator comes back to me and I can then hire temporary people to teach a course or two to relieve a faculty member to develop the next online course, or to teach an online course. It allows me as an administrator the flexibility to get online courses prepared and delivered.

> **Carlos:** One of the reasons there is big support for distance education is because it brings in money, lots of money. And the department keeps that money. It doesn't go into the general fund.

> **Dillon:** When a department is offering a totally online course, 75% of that revenue for the course goes back to the department as opposed to 25% in the general fund. So people are really kind of hot to do that. And there are some departments that -- sometimes it's been kind of an uphill battle with the online thing -- and there are some faculty that really resisted, kicking and screaming and would not do it. So, hence, some departments actually turned to kind of hiring adjuncts that were cheaper, that could kind of crank the work out and put the course up online. And then they would generate the revenue from that.

Dillon, a support staff member, suggested that adjuncts are hired at MSU to help with distance education efforts because of faculty resistance to it, but it is important to note here that *none* of the study participants indicated such practice occurs in their respective subunits. Helene, in fact, stressed the absence of adjuncts in her subunit:

> **Helene:** I think it's consistent with the mission for high quality instructional offerings. We don't hire adjuncts or what we call local hires to teach our courses. *We* [italics added] teach our courses.

St. John (2006) sees an evident pattern among public universities whereas faculty are incentivized to engage in alternative revenue-generating activities, such as research and service projects. He contends that in this scenario, talented faculty will likely focus on activities other than teaching, resulting in adjuncts taking their place and "potentially eroding the quality of instruction" (p. 260). Administrators at MSU, however, indicated that having their own regular faculty members teach the online courses is the norm.

Distance education and promotion and tenure

The second pattern that emerged from the policy document analysis is the absence of language specifying whether blended or online teaching and/or development counts toward promotion and tenure. And the connection between distance teaching and research emerged once again, albeit in only one subunit. Pattern Three in Table 5.1 indicates that only Subunit Two's faculty reward policy specifies that faculty research on his/her teaching counts towards promotion and tenure.

When asked Interview Question 4 about support for distance education in MSU's faculty reward policies, participants from all three groups argued a lack of distance education support is apparent, as evidenced in Table 5.3. The table represents coding of the more common responses to the question. Three of the administrators and two support staff members argued distance education is NOT reflected in MSU faculty reward policies. Raymond declared, "It's not reflected at all" [LAUGHS]. Yaron simply stated, "At the policy level, it just isn't. I think the simple answer there is -- it isn't."

Table 5.3   **MSU DE Support in Faculty Reward Policies**

CODE	Total Responses	Admin.	Faculty	Support Staff
arguing DE is NOT reflected in MSU faculty reward policies	5	3	0	2
arguing teaching is not valued in reward system	4	1	2	1
stressing benefits of 75% online tuition revenue rule	3	1	1	1
suggesting DE is NOT reflected in MSU faculty reward policies	3	3	0	0
stressing lack of sufficient DE faculty reward at MSU	2	0	0	2
arguing DE reward is inadequate	1	0	1	0
seeing 75% of online tuition as ONLY MSU DE reward	1	1	0	0

Thomas, a support staff member who also teaches via distance, argued that

distance education efforts at MSU lack any sort of special reward, although evidence will

demonstrate the contrary for certain subunits examined for this study:

> **Thomas:** There is no particular reward for teaching online. A course
> is a course. In some cases the University may pay somebody a premium
> for a short period of time, put them on for half time in the summer or
> something like that, to build an online course. But there is no special
> credit given to teaching online courses.

Tomoko, who earlier expressed dissatisfaction with MSU's top-down approach,

was emphatic when she argued that MSU lacks *any* distance education reward for faculty

efforts: "I don't think there's anything in the university that rewards faculty for online or

distance education. I don't think there's anything. Nothing." This assertion supports her

earlier criticism of MSU being technologically-behind the times.

And Morrie, a subunit administrator, suggested that distance education does not

count towards promotion and tenure, and he hinted at discouragement of junior faculty

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teaching via distance:

> **Morrie:** It is a real question in terms of a trade off, especially for junior faculty. Is it worth the extra investment to get in to some of these distance education activities that will suck up a lot more time in the beginning when there is no additional payoff? And the payoff doesn't come from the tenure process. I don't think the reward structure is there yet, and that is a challenge for all of us.

Morrie's assertion about distance education not counting towards promotion and tenure could be based on its absence in subunit policy documents. As demonstrated in Table 5.1, blended or online teaching and development were not included in any of the policy documents examined for this study.

Three of the other administrators didn't argue, but rather *suggested* that distance education is NOT reflected in MSU faculty reward policies. For example, Lawrence stated: "I can't say that it is." Helene, however, suggested it is not reflected because it is the same as teaching in the traditional format: "But it's not really reflected. It's valued, but it's not valued any more or any less than the teaching of a face-to-face course."

Helene's view may suggest that MSU translates how it values distance education the same way it translates how it values traditional education. But study participants, as was discussed in the previous section, suggested that teaching is valued very little at MSU. One administrator, two faculty members, and one support staff member, in fact, argued that teaching, whether it be traditional or in the distance format, is NOT valued in the MSU reward system. Yet Pattern Four in Table 5.1 indicates that MSU's policy documents, and four of the seven subunits, specify the importance of *both* teaching and research. This suggests friction between policy and practice.

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Victor, a senior faculty member who teaches via distance, commented specifically

about distance education teaching. His comment reflects what is popularly known as

"publish or perish" at research institutions:

> **Victor:** Now my guess is it [DE] doesn't really figure much at all.
> If it does, it's probably in the category of teaching, which is, to a lot
> of faculty members here, pretty suspect, even though they'll tell you
> it's not.

Two support staff members stressed a lack of sufficient distance education faculty

reward at MSU, with Wendy emphasizing subunit culture as an important factor:

> **Horatio:** Yes, it's a process. That's one of the things that we help aid
> and abet. I mean we help work that to say, 'Okay, you have an idea,
> how are we going to bring everybody else along and what do we do?'
> Because there are not sufficient, in my opinion, sufficient financial
> incentives or rewards to help people do that [DE].

> **Wendy:** Not as much as it could be. I would imagine that it varies
> very widely on the culture of the academic group down at the
> department level. So again, I think that's appropriate too. That's
> a methodology of how you do business. Some groups are going
> to see it as a way to really help them achieve their goals, and they
> may therefore reflect it in their policies, and some may not see it at
> all and therefore it's not reflected in their policies. So, I think it's
> a local faculty decision, how they choose to address it.

Wendy's comment presents a few considerations. First, if commitment to

distance education is strong, reward practices will likely reflect this commitment.

Second, in relation to a pattern that emerged from the mission statement and interview

transcript analysis (that of MSU's decentralized model providing relative autonomy for

subunits use of distance education), faculty reward policies will vary among subunits due

to the decentralized model. Third, if distance education revenue is vital to a subunit

(remember Sterling commented that 80% of his subunit's disposable budget was funded

through distance education tuition revenue), subunit culture may dictate distance education-specific reward for faculty efforts because of the reliance on the revenue.

Impact on junior faculty members

Faculty members and support staff were asked to comment on how junior faculty members are impacted by teaching a distance education course. Most of the replies indicate a lack of support for distance teaching by junior faculty members, as evidenced in Table 5.4.

Support departments interact with faculty members at all levels; two of the seven support staff members, in fact, pointed this out and then *implied* that junior faculty, especially, should not teach distance education. Kenneth compared a distance education course with a traditional one: **"**So, if this [DE] takes more time than teaching an average course, which most people would contend that it does, that's got to come from someplace else." Dillon emphasized its difficulty: "They're slaves. And I think it's a hard life for them. I do hear these complaints a lot." Benjamin, a faculty member, shared his view on the value of gaining teaching experience in the classroom before entering the distance teaching arena:

> **Benjamin:** I think it's very intimidating at first if you have not been
> in the educational world before and you are either fresh out of a doctoral
> program or you are maybe a fixed term faculty member that is suddenly
> asked to come in and teach. That whole idea of doing something outside
> of the classroom -- in the classroom is a little daunting, but to think
> about having to also learn all the technology involved, it can be very
> overwhelming I think. My personal opinion is that in order to teach
> online or to teach by distance education, you really need to feel
> comfortable in the real classroom because the technology is just
> an augmenter of that. It's much more comfortable for faculty I think
> to learn the skills face-to-face where you get immediate feedback by
> looking at somebody -- do they understand or are they sitting there?

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Table 5.4   Junior Faculty Members and DE Teaching's Impact

CODE	Total Responses	Faculty	Support Staff
implying junior faculty should NOT teach DE	4	2	2
arguing junior faculty should NOT teach DE	3	1	2
arguing DE counts little in P&T process	2	1	1
believing junior faculty should connect DE teaching w/scholarship	2	2	0
stressing discouragement of junior faculty teaching DE	2	2	0
stressing lack of time for DE by junior faculty	2	1	1
suggesting DE teaching enhances pedagogy	2	2	0
believing teaching DE takes less time than traditional	1	1	0
suggesting DE teaching takes time away from research	1	1	0
suggesting MSU's DE negatively affects faculty recruitment	1	1	0

Still, others came out and *argued* that junior faculty should not teach distance education. Wendy, for example, provided the following definitive answer: "They shouldn't do it period." Then when asked about connecting scholarship to distance teaching, Wendy suggested MSU's culture does not really support research on teaching:

> **Wendy:** So where you could get rewarded for that and where there's literature that you can publish, and especially where it ties in with your own research, I think that's dynamite, but the whole idea of focusing on the scholarship of teaching in a research university just, it's not, it's just, it's not at high a priority as it would be, as I would like it to be in some cases. But that's not what our culture's about, that's not what our university community's really about. Not to say that teaching is not

important, but, I don't know. It's just, if I were a junior faculty member here, I would have to focus on my research to get tenure, and teaching, whether face-to-face or using some sort of technology in my face-to-face, or doing completely online, doesn't really make a difference. It's still in the category of teaching.

Thomas exclaimed it would be foolhardy for a junior faculty member to take on distance teaching: "A junior person would, in my opinion anyway, be foolhardy to devote the time -- rewarded extra or not -- devote the time it takes to do a good job in developing online materials." Thomas was then asked the following clarifying question since he commented on developing an online course rather than the teaching of one:

> **Interviewer:** What if it was just teaching a course that already had been developed and the junior faculty member only needed to do the instruction, maybe modify it a tiny bit?

> **Thomas:** That hasn't been our experience. First of all, it's relatively rare for a junior person to want to get involved in teaching those courses that would be, for us, the main candidates for online -- the big enrollment courses.

Two faculty members *stressed* their discouragement of junior faculty teaching via distance. When discussing a new hire, Emma had the following to say:

> **Emma:** If he just kind of sailed off on his own, I would strongly recommend that he not do it. His time would be very poorly spent designing an online course even if that class brought in $250,000 this summer.

Emma's comment implies that revenue is secondary to faculty achievements in her subunit.

Abby, a senior faculty member from another subunit, stressed that she would discourage junior faculty members from venturing into distance teaching. She also implied that tenured faculty members are better suited for distance teaching because they are not establishing their research program like junior faculty members are:

Abby: I would discourage any junior faculty member that came to me about it. I don't think that junior faculty -- with the demands in our department on research productivity, you shouldn't be spending your summers teaching. So even though it is a minimal amount of time compared to in-class teaching, it is still time, and it takes away from what they need to be doing during the summer, which is writing those grants and writing those papers. I think that is why [our Chair/Director] doesn't encourage junior faculty to do it. If you already have tenure, you don't need to worry about getting your research program off the ground. On the other hand, there is so much effort needed for DE, we are not going to be encouraging junior faculty to do it."

To emphasize how little teaching counts in the promotion and tenure process, Emma referred to a recent discussion she was involved in regarding tenure for a junior faculty member in her subunit who teaches both traditional and distance education courses:

Emma: Well, let me give you a little window into the world here. We just this last week or maybe the week before, considered one of our junior faculty for promotion and tenure. In the course of the conversation which lasted about 45 minutes, the vast majority of the conversation was about [his/her] research program -- [his/her] ability to get grant money, [his/her] standing in the research community. And then the last 10 minutes or so of the conversation had to do with [his/her] teaching. But there was not one specific reference in that conversation to any one specific course [he/she] has taught.

However, Michigan State University's 'Appointment, Reappointment, Tenure and Promotion Recommendations' state the importance of recognizing both teaching and research, and imply distance education efforts as well, but only if outreach is thought of as distance education, as study participants previously suggested it was.

IV. ACADEMIC HUMAN RESOURCES POLICIES

APPOINTMENT, REAPPOINTMENT, TENURE,
AND PROMOTION RECOMMENDATIONS

The Office of the Provost sends this policy annually to deans, directors, and chairpersons to assist them in reappointment, promotion, and tenure decisions. During its annual review, the University Committee on Faculty Affairs and the University Committee on Faculty Tenure can suggest changes.

Assessment of faculty performance should recognize the importance of **both** teaching and research and their extension beyond the borders of the campus as part of the outreach dimension.

Source: http://www.hr.msu.edu

Carlos, another faculty member, suggested that distance teaching has taken time away from his junior colleague's research, but pointed out the possible benefit to it as well. Victor suggested that higher education culture contributes to a distance education stereotype that can negatively affect MSU recruitment of new faculty:

Carlos: For my colleague who's on a tenure track, I think it has taken time away from [his/her] main focus of research. On the other hand, I'm no so sure that's all bad. I mean I think [he/she] is also carving out a niche for [himself/herself] and making [himself/herself] valuable.

Victor: Hiring and higher education, there's a sort of an iron walk of academic demography. That is -- nobody ever winds up teaching at an institution as good as the one where they went to graduate school. A famous anthropologist formulated a version of this theory of academic downward mobility. It's almost universally true. So the people we hire are often, more often than not, at institutions better than us. That means there are places that are not doing any online learning. So they come here already socialized to think that, 'Well, that's for lesser institutions.' You see what I mean?

One junior faculty member, however, indicated she likes distance teaching better than traditional teaching, believes it takes less time, and emphasized its flexibility for faculty:

> **Gayle:** I actually like it better. I actually think it takes less time. I can teach it in my own time and my own space, so when I travel it's fantastic because as a researcher I have to go to Washington D.C., I have to go to California, to Texas. I'm traveling to conferences and workshops and stuff. And if I'm gone, I can still teach my class. I just take my computer and I continue working. Anytime that I want to teach all I have to do is log on and teach. So, if it's two-thirty in the morning, I can log in and see what students are doing. On Sunday afternoon -- I can teach on Sunday afternoon for a couple of hours. So, instead of, 'Okay I have to be on campus from one to four, and I have to make sure everything is done by Tuesday night because I have these five meetings and all the papers have to be graded by this time and that time,' -- those pressures of time go away. And I feel there's more individualized attention when I'm online, and I'm not quite sure how to say that, but in a class of 45 or 50 I actually get to know the students better than I do looking out at a room full of students.

Gayle, although contrary to popular opinion, favors distance education for junior faculty members, based on her own experience with it. Earlier on, she had also emphasized the intrinsic benefits of teaching distance education. Still, the majority of those asked warned against the perceived amount of time involved, and the lack of extrinsic rewards for junior faculty members venturing into distance education.

MSU Faculty Review Policy

As discussed in Chapter Three, relevant MSU policy documents in the following areas were examined for this study: probationary periods, definition and locus of tenure, faculty ranks and titles, promotion, and compensation. The following 'MSU Faculty Review Policy' indicates principles regarding the merit process, and the subsequent

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discussion is indicative of the interplay of the institution and faculty as presented in the

conceptual framework for this study:

IV. ACADEMIC HUMAN RESOURCES POLICIES

FACULTY REVIEW

This policy was issued by the Office of the Provost on February 11, 1997 (to be effective Fall semester 1997) and revised on March 3, 2003; it reflects advice by the Faculty Council and the University Committee on Faculty Affairs.

All units must have procedures for written evaluation of tenure system faculty at all ranks to support the annual merit process and to provide a basis for a clear statement of performance expectations and accomplishments. It is recognized that provisions and practices in units may vary; however, all evaluation procedures must incorporate, at the minimum, the principles included in this model policy for regular faculty review, and must be applied uniformly to all faculty in the unit.

I. Principles
While some variation may occur in the approach to reviews, the following principles as implemented by unit procedures are to be followed by unit administrators (i.e., Deans, Chairpersons and Directors) and faculty. In the case of faculty with joint appointments, a lead unit administrator shall be designated. The process should be clearly defined by the bylaws or established personnel polices and procedures of each academic unit.

a. Each tenure system faculty shall be evaluated on an annual basis and informed in writing of the results of his/her review by the unit administrator.

b. Each unit shall have clearly formulated and relevant written performance criteria and shall provide these at the time of appointment, and subsequently as necessary, to all faculty to clarify expectations.

c. Faculty shall be informed of all factors used for evaluation, the evaluation of their performance on each of these factors

and the relationship between their performance and decisions on merit salary adjustments and, if appropriate, on reappointment, promotion and tenure. Faculty are entitled to have all their assigned duties given weight in the evaluation.

d. These annual assessments of faculty reviews shall be reflected in recommendations to the Provost's Office regarding reappointment, tenure, and promotion.

Source: http://www.hr.msu.edu

The policy indicates that subunits should have clearly formulated and written performance criteria, and that assigned duties be given weight in the evaluation process. Pattern Five in Table 5.1, in fact, indicates that four out of the seven subunits specify technology use by faculty as a performance indicator. Subunit Two was, therefore, found to have the most policy pattern indicators related to distance education (four).

Faculty members were asked about their subunit's reward criteria, and Table 5.5 indicates that the majority of faculty interviewed for the study believe clear communication about criteria is evident in their subunit. Eleven of the fourteen faculty participants made this claim; for example, Cynthia emphasized strong communication about criteria in her subunit, especially with junior faculty members:

Cynthia: We are very good about communicating, particularly with our junior faculty, about what those expectations are.

Abby: Very well. They know it is basically research, publication activity, grant activity, and the service and outreach are sort of the next, and then teaching.

Gayle: Oh, that is made extremely clear.

Thomas: Oh, very well I suspect.

Table 5.5   Faculty Understanding of Subunit Reward Criteria

CODE	Total Faculty Responses
claiming clear communication about criteria in subunit	11
arguing subunit's faculty reward criteria is vague	2
stressing DE teaching equals traditional	2
arguing subunit has clear DE teaching criteria	1
reiterating ambiguity of subunit's DE teaching criteria	1

These participant comments, however, contradict the confirmed absence of a written distance education policy in any of the subunits. If criteria is made clear to faculty members, as these participants suggested, and distance education is offered in each of the subunits, how is criteria about distance education efforts conveyed? Informal processes are thus implied.

Three faculty participants, however, argued a lack of clear communication of criteria in their subunit. For example, Emma argued her subunit's reward criteria is vague: Aahh, it's vague. It really is. The instruction thing is such an intangible view." Xavier, a junior faculty member, reiterated an earlier statement he made about how ambiguous his subunit's reward criteria is: "I think that's probably the biggest thing, that's the really biggest unknown."

Still, when asked about criteria, two faculty members went so far as to *stress* that distance teaching equals traditional teaching in their subunit. Patricia affirmed, "Something like online teaching, we just treat that as part of your teaching assignment. It

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really doesn't matter if it's online or not online." Lily also pointed out it is equal: "Yeah, I mean there's not a difference at all."

Item C of the 'Faculty Review Policy' points out that MSU faculty are entitled to have *all* of their assigned duties given weight in the evaluation, but is distance education instruction given weight? Thus, in order to gain a sense of how subunits value distance education instruction in the reward process, administrators were asked the following question: **How is distance education instruction valued in the faculty reward system for the department?** Table 5.6 indicates that three administrators confirmed the absence of a written distance education reward policy for their respective subunits. For example, Joshua and Raymond explained:

> **Joshua:** Organizationally we have not gone back and modified the formal criteria to make that explicit.

> **Raymond:** I think the development of online courses has been a value to the department, and we have recognized it at the time that the course is developed. Perhaps with some nominal raise -- certainly not something written out.

Raymond's comment indicates that his subunit values online course development. Raymond also argued that faculty in his subunit do not ask for distance education reward; rather, he suggested reward comes in the form of graduate student support from the online tuition revenue:

> **Raymond:** No, I have done nothing like that and nobody has asked. When we first started developing them we were taking 3-4% budget cuts a year and we had, literally, no graduate student support. And my plea to them [faculty] was to start making some money. And this is one way we could make some. And my agreement with them was that we would fund graduate programs accordingly if the individual interest areas contributed to online course development. We then got a reasonable increase in the number of graduate student allotment and our enrollment for the online courses has been more than we hoped, so we have not really had a lot of financial pressure for the last two years.

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Table 5.6   DE Instruction and Its Value in Subunit Reward Systems

CODE	Total Administrator Responses
indicating lack of written DE reward policy	3
arguing faculty don't ask for DE reward	1
arguing informal DE reward structure is intentional	1
claiming DE-specific policy is not an issue in subunit	1
implying faculty pay for summer DE is greater than effort	1

Raymond's additional comment indicates that having money to fund graduate students is highly valued in his subunit. Joshua pointed out that his subunit intentionally lacks a formal distance education reward structure because of the flexible nature of an informal structure:

> **Joshua:** I think for the online education in particular, there's informal processes that basically involve me working with individual faculty members in terms of trying to look at the needs of the curriculum and trying to fill those needs. And so I've become involved in trying to talk on an annual basis with faculty as we're kind of planning for the upcoming year -- to encourage them to consider teaching online courses and then providing the necessary resources and rewards that might encourage them to do that. Basically, it [the informal DE reward structure] is general enough now that you kind of feel like you can reward someone for the development of a new course.

And Sterling, whose subunit uses distance education teaching assistants and online coordinators, claims that a distance education-specific policy in the subunit is not needed because of the use of graduate assistants:

Sterling: Well, it's never been an issue I guess. They [faculty] are the teacher, they are the instructor of record, but they do not teach the course. Graduate students are interacting with the students. They develop all the exams, they develop the syllabus obviously, they control the readings and all that sort of thing, but that's all pretty much set up in advance and the actual running of the course and the interacting with the students and the grading of the exams, keeping track of records, emailing, maintaining the chat rooms, all that sort of stuff is all done by graduate students. And the faculty member is the sort of supervisor of that, but is not really actively involved day-to-day because that's what [the online coordinators] do is manage those TAs. So it's sort of a three-tiered management system.

Lastly, Raymond implied that faculty pay for teaching distance education [in the summer] is greater than the actual effort faculty generally put into teaching such a course:

Raymond: They get half of what they would get if they were standing in front of a class teaching it. Plus they get a teaching assistant to help them. So I think some of them are doing very little during the summer [LAUGHS] frankly, unless there is a problem with the course. Work is done usually before the course goes live because they have to develop the materials and update them. But my impression is that there are not "actual" hours spent during the summer by our online faculty.

Therefore, participant views thus far indicate that a lack of *written* distance education policy in subunits could be due to: 1) its relative newness in the subunit resulting in a failure to yet add it to a policy; 2) use of graduate students for primary instructor roles viewed as distance education reward; 3) equal footing with traditional instructional efforts, so distinction in a policy is not needed; and, 4) the benefit of a flexible informal policy.

The equality of distance education and traditional reward

In order to continue to explore how distance education is valued, faculty members were asked directly if distance education instruction is equal to that of traditional

instruction in the faculty reward system in their subunit. Table 5.7 highlights their

answers. The findings indicate that relatively few faculty members argued distance

education instruction and traditional instruction were equal in regard to reward. In fact,

faculty participants provided numerous comments suggesting the opposite. For example,

the following discussion took place when the interviewer asked a participant about the

equality of distance and traditional instruction in regard to reward in the subunit:

> **P:** Actually, they [faculty member] do not get paid at all for their online
> offerings. It's kind of interesting. The graduate student gets paid for
> teaching it. They [the faculty member] are known as the advising faculty
> on the course, and it is known as their course, but they are not paid every
> time their online course runs.
>
> **I:** So they are overseeing a course that runs in the summertime, but they
> are not receiving any sort of overload pay or anything?
>
> **P:** Correct. And it does not count any toward their teaching load.
>
> **I:** Oh, that is really key. I am glad you told me that.
>
> **P:** Yeah, I have often wondered why they do it [LAUGHS].

It is important to note here, however, that MSU's policy regarding overload pay

states three important policy points that provide insight into the summer pay discussion

above. The 'Overload Pay Policy,' seen on the following page and adapted from MSU's

'Academic Human Resources' webpage, indicates that in order for an overload pay

assignment to be approved, the assignment must represent a substantial increase over

regularly assigned duties. Part-time and full-time summer assignments are not

considered overload, unless full-time overload pay assignments are made pursuant to the

Policy. In addition, graduate student assistants can take the place of overload pay. This

suggests variation in workloads.

Table 5.7   Distance Education Reward vs. Traditional

CODE	Total Faculty Responses
arguing DE & traditional reward not same in subunit	4
indicating subunit rewards DE more than traditional	4
stressing DE reward equals traditional	2
confirming DE counts toward P&T	1
implying some faculty in subunit wouldn't support DE reward	1

IV. ACADEMIC HUMAN RESOURCES POLICIES

OVERLOAD PAY

The following policy was approved by the Board of Trustees on October 16, 1970 and revised on May 5, 2006. (A college may establish a more restrictive policy).

I. Applicability

This policy applies to full-time faculty members (tenure system and fixed term) at the rank of instructor through professor, full-time academic staff (including specialists, librarians, and extension service staff), full-time executive managers, and full-time academic administrators (e.g., deans, department chairs, and school directors).

II. Overload Pay

Faculty and staff may request approval for overload pay for overload assignments related to teaching, research, outreach activities, and academic and student support activities. Executive managers and academic administrators may request approval for overload pay for overload assignments related to their administrative duties and/or expertise.

III. Required Approval

2.b(i).

The proposed assignment represents a substantial increase
over the individual's regularly assigned duties.

IV. Summer Appointments

Faculty and academic staff members appointed on an academic
year basis may have part-time or full-time summer appointments
in teaching, research, and/or outreach. The salary for such a
summer appointment may not exceed 3/9 of the faculty or
academic staff member's salary during the previous academic
year. These summer appointments are not considered overload
pay assignments and are not subject to this Policy. However,
faculty and academic staff members who hold full-time summer
appointments are also eligible for overload pay assignments
during the summer if such assignments are made pursuant to
this Policy.

V. Other Provisions

4. Assignments which might normally justify the payment
of overload pay may, by mutual agreement, be compensated
for by subsequent release time for research, the assignment
of additional graduate assistants/other support staff, or other
forms of programmatic/professional support instead of by
overload pay.

Source: http://www.hr.msu.edu

As previously mentioned, and noted in Figure 2.5, the literature also demonstrates

that faculty workloads typically vary in higher education units (Baldwin & Chronister,

2001; Blackburn & Lawrence, 1995; Milem et al., 2000), as does compensation for

course development and instruction, including distance education efforts (Berg, 2000;

Gappa et al., 2007; Sutton & Bergerson, 2001).

Two other faculty members' answers regarding distance education and traditional reward suggest inequality. Xavier said they are completely different, and William reasoned that distance education is still too new:

> **William:** No. I don't think that it has been around for enough years yet to really have a solid base where there is a real sense -- probably it would have to happen at the university level as well -- that this is something that the university placed importance on; this is going to be in our catalog and listed as "this is going to be a high priority at MSU." I think until it reached that point, probably it wouldn't be considered the same way in our department.

William's comment suggests a top-down approach is needed for distance education reward to be considered in his subunit, and that the relative newness of it is also a contributing factor. Xavier, a junior faculty member who teaches via distance, spoke from experience and *emphasized* its difference.

Four faculty members, however, pointed out that distance education instruction is actually rewarded more than traditional instruction in their subunit, but it is important to note that none of them are junior faculty members, and two of the faculty members are from the same subunit. Victor claimed, "Oh, absolutely if not more, we have, in this particular department." Emma suggested, "I guess if you look at it objectively, the online instruction is probably rewarded more." Carlos pointed out, "It counts toward one's teaching load exactly the same way -- actually you're given a little bit more of an incentive financially to get involved in blended." And Morrie, an administrator, indicated a monetary incentive: "You get an extra $500 actual bonus for teaching distance education."

Still, according to the faculty member comments, distance education is viewed as being rewarded more than traditional education in three of the seven subunits examined for this study, although not in a written policy.

Involvement with reward structures

Although MSU's 'Academic Salary Adjustment Guidelines' do not mention either blended or online learning, under 'Merit Basis,' it does indicate that faculty advice be sought by primary unit administrators. As such, during the interviews, administrators and faculty were both asked to comment on the extent of faculty member involvement in the development of the faculty reward structure for their respective subunit. Similarly, support staff were asked how involved they are with the creation and implementation of faculty reward policies at MSU. Four of the administrators and seven faculty members indicated active faculty reward involvement in their subunit. For instance, Natasha indicated active faculty involvement:

> **Natasha:** We have an advisory committee. When you're talking about the reward structure, we've had discussions and come to consensus as a whole on what faculty expectations are, what evaluation procedures are, those kinds of bigger issues.

> **Joshua:** They're very involved in the sense that we have a series -- they're actually part of our school's -- our performance measurement criteria were developed by the faculty in open deliberation and became part of our bylaws. And so to modify those criteria involves faculty governance through the bylaws.

Victor declared, **"**They own it," and Thomas argued, "They're involved a lot because we have a weak chairman model in the sense that the chairman is expected to consult a lot with an elected Department Advisory Committee."

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Faculty members, however, provided more varied and detailed answers to the question than administrators, as demonstrated in Table 5.8. For instance, three faculty members admitted they lacked knowledge of faculty reward involvement in their subunit. William admitted, "That I don't know." Gayle affirmed, "Well, I wasn't there when that was done," and Xavier guessed, "I *think* [italics added] when changes happen we're consulted. I don't know."

One of the faculty participants talked about how little distance teaching counts in the promotion and tenure process during her discussion on faculty reward involvement with the reward structure. And Emma commented on her subunit, as well as MSU in general:

> **Emma:** If I were just doing online stuff and just focusing on teaching, I wouldn't get promoted that way. So it's a very small part of what is valued at the University, which is a reflection of the overall squeeze that is being put on universities as a whole.

Yet two other faculty members confirmed that distance teaching counts toward promotion and tenure in their subunit. Lily, for example, discussed her subunit's intent to include distance education: "The committees actually designed this whole process of building incentives, counting online instruction, everything." It is important to note, however, that Lily works in a subunit that does not allow junior faculty members to teach distance education courses, so the incentives she referred to in her discussion are for associate and full professors only.

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Table 5.8   **Administrator and Faculty Member Views
on Faculty Reward Involvement**

CODE	Total Responses	Admin.	Faculty
indicating active faculty reward involvement	11	4	7
confirming DE counts toward P&T in subunit	4	2	2
admitting lack of knowledge re: faculty reward involvement	3	0	3
believing Faculty Advisory Committee = faculty involvement	3	0	3
indicating lack of written DE reward policy	3	2	1
arguing DE counts little in the P&T process	2	0	2
admitting reward structure needs constant attention	1	0	1
stressing subunit's cohesiveness and collegiality	1	0	1

Three faculty members expressed their belief that participation on a subunit's Faculty Advisory Committee demonstrates faculty involvement with the development of the reward structure, with Emma also emphasizing the constant attention that the faculty reward structure needs: "It is a very complex thing that is probably the number one thing that we systematically and routinely are gnashing our teeth about."

During the discussion on faculty involvement with reward structuring, two of the administrators and one faculty member indicated their subunit lacked a written distance education reward policy. Joshua indicated that distance education is rewarded in his subunit, but that no written, formal criteria exists yet:

> **Joshua:** [He/she] will get extra credit. Now my only qualification there is organizationally, we have not gone back and modified the formal criteria to make that explicit.

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Cynthia indicated that not only are faculty completely involved in the development of the reward structure, she also pointed out that her subunit lacks a written distance education policy:

> **Cynthia:** We are completely involved. It's our decision about how we are rewarded. And there's been, as I said earlier, a lot of haggling about that. There is some tension between the kind of people who want more things that aren't peer reviewed to count. To be honest, all of our haggling goes with this publication issue more than anything else. The teaching issue, I think, is pretty clearly defined and we don't mention online teaching specifically in our policy. But essentially we're looking just to be teaching normal loads and to get good course evaluations, that's how we're evaluated. If I thought that should be changed to reflect a greater reward for teaching online, I would go to my colleagues and we would discuss it. And I feel pretty good that that's driven completely by us.

Based on the data, 'subunit culture' emerged as an important factor in regard to distance education reward, value placed on it, etc. In fact, three faculty members stressed how cohesive and collegial their subunits were. Lily repeatedly emphasized the cohesive culture that exists in her subunit, and also pointed out a high level of faculty involvement with policymaking:

> **Lily:** In this particular department I'd say quite active. In our department we have a couple of committees. One committee is called Department Committee on Academic Policy. And that committee works in partnership with the program coordinators and the chair. And together they actually create academic policy, academic policies and practice. It's a very collaborative department.

Table 5.9 illustrates support staff involvement with MSU faculty reward. Maria, a support staff member argued faculty, not MSU, decide reward: "When it comes to policies, it is faculty who determine that and I am not a faculty member."

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Table 5.9   Support Staff Involvement with Faculty Reward

CODE	Total Support Staff Responses
claiming no involvement with MSU faculty reward policies	4
implying influence re: faculty reward at MSU	2
arguing faculty, not MSU, decide reward	1

Four support staff members claimed no involvement with MSU faculty reward

policies, whereas Yaron and Kenneth implied they exert influence in this area:

> **Yaron:** I am able to sense points of tension as well as to see examples
> of good success, and I do have the ear of the provost and other senior
> academic and operational administrators, so I do have some involvement.

> **Kenneth:** We will talk about what incentives are in place, for people
> that do various things. And we will say what we think provides, essentially,
> an incentive that has as many negative side effects as it does positive
> consequences, in terms of, in our view, what will happen if that incentive
> is in place. Or if that incentive was taken away, what would -- what
> programs would we potentially lose, or what programs that we have now
> would we probably never have had without certain incentives.

Commitment to distance education

Besides being asked directly about distance education reward structures,

administrators and faculty were asked how else commitment to distance education might

be conveyed in their subunit. Table 5.10 illustrates participant views.

Table 5.10   **Subunit Commitment to Distance Education**

CODE	Total Responses	Admin.	Faculty
believing offering DE = subunit commitment	6	3	3
claiming subunit is committed to DE	4	2	2
arguing need for online coordinator in subunit	3	2	1
indicating relatively little marketing of DE	3	2	1
admitting subunit NOT committed to DE	1	1	0
emphasizing subunit's DE training methods	1	1	0
implying DE is not vital to subunit	1	1	0
indicating MSU DE rewards program	1	1	0
seeing DE continuing education for faculty as subunit commitment	1	1	0

Three administrators and three faculty members expressed their beliefs in that

merely offering distance education courses and programs conveys subunit commitment.

The following includes comments from both groups:

Madelaine: Well, grad students take courses and we have the
online Master's program. We've used distance education to make
life a little easier for them.

Natasha: Well, first of all by making it available. Secondly, by
taking it seriously, addressing issues that arise. I guess, thirdly,
by continued development. We're slowly but steadily expanding
what we offer.

Abby: I think the department shows commitment by putting money
into developing several courses and then continues to run them every
year.

Helene: Well, the courses are taught on a regular basis. If a faculty member who developed the course is for some reason unable to teach it, for example on sabbatical, two different things happen. Either the course is taught out of sequence with load adjustment agreed to by the Chair so that the faculty member can continue to maintain the commitment, or another faculty member steps in to teach the course for that semester.

These participants all demonstrate that the continuity of distance education's presence in their respective subunits demonstrates commitment to it, which in turn expresses value. Participants provided other examples of subunit commitment to distance education, including technology training and continuing education for distance education faculty. For instance, Tomoko compared her subunit's technology training with that of campus-wide initiatives:

Tomoko: Campuses run all of these programs of coming to campus and learning centrally how to use bells and whistles, different kinds of technology, different kinds of software, and you can attend all these sessions. That's fine, but that doesn't do it. And the reason is -- is that technology should be led with the questions and the issues and 'here's something that I'm trying to do, or here's a way I'm conceiving of something, or here's a problem I'm trying--I don't know how to accomplish this.' And the question is -- then how do you use technology to solve those problems or to accomplish something or to do something that you otherwise couldn't do -- that doesn't start with just learning technology? So I don't encourage people in this college to go to all of the campus kinds of things. We do have a lot of things in the college that we use to bleed it the other way, and we say, "If you have these questions, here, we'll talk about various kinds of technology that can help you do something that otherwise you couldn't do."

As the conceptual framework in Figure 2.5 suggests, the interconnectedness of faculty members and technology cannot be stressed enough. A lack of training and support can lead to much faculty frustration and can result in faculty resistance to distance education. As Olcott and Wright's (1995) 'Faculty Support Model' suggests,

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continuing education units and media services (displayed in concentric ring three) typically accommodate instructional support services and provide training for faculty, both of which are vitally important to distance teaching.

In Tomoko's comment, she indicated that her subunit recognizes the importance of training and support, but she clearly emphasized her desire for it to be internally provided. Lawrence indicated he sees distance education 'continuing education' for faculty as an example of subunit commitment: "How else? Let's see, there has been a fair amount of support for continuing education for the faculty in that area."

When asked about commitment to distance education, one administrator admitted his subunit is *not* committed to distance education. And three participants from different subunits all took the opportunity to comment on how little their subunit markets distance education offerings. Cynthia admitted, "We don't do a lot of advertising for it." Serena pointed out, "That's something we've been trying to do for a while, but it has not panned out. We actually do not market our courses at all." And Raymond professed, "We advertise them in 'course listings' and we get all of the enrollments that we want [LAUGHS]. So we don't put an effort into advertising it or promoting it."

The one dissenting view regarding commitment further supports the evidence that distance education is offered in that specific subunit merely as a means to obtain an alternative revenue source. And although the seventy-five percent online tuition revenue was certainly found to be attractive to the other subunits (as evidenced by prior quotes), the data indicates that the value of distance education to subunits is expressed more through informal structures such as extra bonuses, travel funds, etc. *as a result of* the seventy-five percent online tuition rule.

Faculty recruitment

Given that commitment to distance education, and faculty reward for such efforts varies across MSU subunits, views on how distance education's presence affects faculty recruitment were expected to vary as well. Table 5.11 highlights differing opinions provided by administrator and support staff participants, whom were all asked about recruitment. Again, subunit culture played an important role in many of the discussions.

Three administrators suggested that faculty recruitment was *not* affected by distance education's presence in their subunit. Raymond even suggested that potential recruits are likely unaware of distance education's presence: "I don't think it has any impact at all. They probably don't even know about it [LAUGHS] when they are recruited." It is important to note here that Raymond, an administrator, projected an overall negative opinion of distance education throughout his interview discussion, although distance education courses continue to be offered in his subunit.

Three respondents *implied* that distance education does not negatively affect recruitment. Dillon, a support staff member, pointed to generational differences: "I think we're past the kind of break point where now we are hiring younger faculty and this is not so foreign to them." Dillon's view might present a contradiction to what some administrators and faculty members have argued -- that junior faculty members should steer clear of distance education. Dillon's point about it not being foreign to newer faculty has merit, however; it supports the earlier comments made by two junior faculty members in regard to the intrinsic rewards they receive for distance education efforts.

Table 5.11   Faculty Recruitment and the Presence of Distance Education

CODE	Total Responses	Admin.	Support Staff
believing DE helps subunit with faculty recruitment	3	3	0
implying DE doesn't negatively affect faculty recruitment	3	2	1
suggesting faculty recruitment not affected by DE presence	3	3	0
arguing DE's flexibility helps junior faculty	2	2	0
stressing discouragement of junior faculty teaching DE	2	1	1
arguing DE is prestigious for subunits and MSU overall	1	1	0
arguing faculty in subunit are content	1	1	0
implying subunit culture conveys what is expected of faculty	1	1	0
indicating DE teaching mandate in subunit	1	1	0
indicating lack of DE teaching mandate	1	1	0
pointing out increased faculty interest in DE teaching	1	1	0
stressing importance of subunit culture	1	1	0
suggesting DE teaching negatively affected recruitment	1	1	0

Lawrence appeared unsure whether or not distance education positively affected

recruitment, but did not suggest it *negatively* affected it in any way:

Lawrence: We were very successful last year with our recruitment
effort for fixed term positions for individuals who would be primarily
involved in the undergraduate program. And had a very, very successful
outcome from that search. The individuals who are involved in that seem
to be picking up on using the distance. I can't say that's why they came
or why they didn't.

Joshua, however, suggested that online teaching duties have raised concerns among

potential recruits:

> **Joshua:** I think it's a really good question and it's something that
> we're likely to encounter in the next couple weeks. I was just at a
> professional conference where I was talking to some candidates
> for one of our faculty positions. We've not made it mandatory,
> but I guess the reason that I think we will, although there would
> be reluctance to do so, is that we really want some of the courses
> taught online. And while we do pay the most attention to research,
> if somebody comes in and does a terrible teaching presentation --
> even if we still think that they're probably a good researcher --
> we would be concerned about their ability to teach. So I'm
> not dismissing that. I think the concern about making it
> mandatory would be that we might lose some real top scholars
> who might, for whatever reason, just say "I'm not interested in
> that." And it kind of came up in a current search. And then the
> second criteria [affecting recruitment] is that it's probably more
> peculiar to this field than it looks. It probably has to do with the
> way we described it because some of the candidates have raised
> concerns.

Three of the eight administrators expressed belief that distance education has

actually helped their subunit with faculty recruitment. For example, Morrie commented:

> **Morrie:** For people who are interested, knowing what we're
> doing is appealing. For people who are not interested in distance
> ed., we still just say that this is part of who we are. We don't
> require that new faculty have to know that we're doing this and
> they may at some point be asked to do it. But I don't think it's
> hurt us at all. In fact, I think it's helped us because of the reputation
> of our blended program.

Two administrators argued that distance education's flexibility actually helps

junior faculty members, while Raymond (and one support staff member) stressed his

discouragement of junior faculty teaching distance education. Tomoko emphasized the

benefits of distance education and travel schedules:

Tomoko: I believe it is very attractive because it means a lot of teaching in the summer is an option for faculty. Faculty can be anywhere. They don't have to be here. They can do their course from anywhere. So that's tremendous flexibility. They can be out doing their research, they can travel. So it's quite freeing in some ways.

Raymond pointed out that newly-hired junior faculty are not encouraged to get involved with distance education: "No, nor do we expect them to develop one." However, when asked if he would prohibit a junior faculty member from teaching an online course, Raymond offered the following answer: "*If* [italics added] they can convince me that it is not going to detract them from their research."

Sterling argued that distance education faculty in his subunit are content, while Joshua pointed out increased faculty interest in distance teaching:

Joshua: It's also interesting that some of the faculty have expressed interest now that it's less foreign. They didn't want to be a pioneer but now they see, well, "gee I have a semester where I'd really like to be in Ireland working on this research project or Washington, D.C., but I am responsible for teaching a course." Well, that opens up the door for me to say, "Well, if you develop this online you could do it from any location." So that's created some additional flexibility.

During the course of the interviews, it became apparent due to participant comments that three of the seven subunits examined for the study have a distance teaching mandate. Tomoko indicated her subunit has a distance teaching mandate for faculty, and also pointed to subunit culture when discussing what affects recruitment: "They will not hire a new faculty member who is not willing to learn it immediately and do it. So that is their culture now. That is theirs."

Subunit culture was mentioned by yet another administrator when he/she implied that subunit culture is what conveys expectations of faculty, whereas Tomoko *stressed* how much her subunit does not respond to rules, but rather likes guidelines:

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Tomoko: This college does not respond to rules. Does not respond to rules. They do not like rules. Even our load policy, faculty load policy, people call it "guidelines." Even though it's really quite explicit, we don't like policies. So we like guidelines. It [policy] just does not work here.

As evidenced by data from the interview transcripts analysis and identified policy document patterns, reward practices for faculty distance education efforts vary in MSU subunits, and are a direct result of subunit culture.

Multiple DE Support Departments

As participants have indicated, training is important to MSU faculty who teach via distance, and the literature demonstrates that distance education faculty, in general, desire adequate support from their institution for distance education efforts, including proper training and technology support (Olcott & Wright, 1995; Schifter, 2005; Wolcott, 2003). Numerous researchers have indicated that lack of technological skills and training are often reported as primary concerns for faculty in the distance education environment (e.g., Betts, 1998; Bower, 2001; Dillon & Walsh, 1992; Salter, 2005; Schifter, 2005). Rockwell et al. (1999) believe:

> While the educational model for delivering instruction broadens, technologies continue to advance, educational delivery methods continue to expand, and audiences become more diversified. In this changing environment, faculty members remain a key element in the teaching and learning process" (p. 2).

In addition, institutions and technology are inextricably linked by the resources that assist with its interactive and collaborative nature (as indicated in Figure 2.5).

First introduced in Chapter Three, MSU's decentralized model includes five support departments that work together to support all distance education efforts. In

addition to Interview Questions One thru Ten, the seven support staff members

interviewed for this study were all asked one additional question about MSU's lack of a

central distance education office. As indicated in Table 5.12, two support staff members

considered lack of funding as the primary reason for multiple versus one central

department. Yaron and

Wendy argued that budget restrictions are a reality that is dealt with at MSU:

> **Yaron:** MSU simply can't afford to have redundant departments
> and staff, so we have been forced by our economic situation to
> work hard to integrate online education into our regular existing
> administrative structures.

> **Wendy:** The Spartan way is you try to do it on very little additional
> investment and you try to make it. Instead of making something
> special and specially funding it and making a new unit out of it,
> you try to integrate it in with what you already do, and that's just
> the way things work around here. And it works well!

Yaron also indicated that multiple distance education support departments have provided

an advantage to MSU faculty as distance education has become more mainstream:

> **Yaron:** As online and blended instruction becomes more and
> more a part of traditional courses and programs, our faculty have
> been able to just bring these methods and formats into their
> mainstream programs without really thinking about it. We've
> observed that in places that have separate offices and also a separate
> faculty and staff for online distance education, this transition to
> using the same methods in traditional formats has been much more
> difficult and is taking much longer to achieve.

Yet Horatio and Dillon pointed out how the use of multiple distance education

support departments can cause confusion when seeking help with it:

Table 5.12   Lack of Central Distance Education Office

CODE	Total Support Staff Responses
arguing budget restrictions means multiple DE support offices	2
implying central DE office = less subunit autonomy	2
suggesting lack of DE central office = confusion with who can help	2
seeing multiple DE support offices as huge advantage	1

Horatio: If I need an instructional designer and a graphic person
to really help me develop my courses -- because you know I'm
not really sure that I want to take all of that on -- I can work with
the Virtual University [VUdat]. If I think I might have an
entrepreneurial idea or something that I would like to take further,
I can work with MSU Global in doing that. The issue with that,
however, is awareness so that people know what those things are
and sometimes people don't know what they don't know.

Dillon: A central office has benefits -- I liked a central office myself,
you know having worked in that environment. It gives you one place
to go and you know what you're doing.

Maria implied that MSU's decentralization may not be efficient when asked about

the lack of a central distance education support office:

Maria: There is a bias against centralization on this campus, a
very strong bias. Even when it is inefficient to do otherwise. But
the culture is that these colleges have their own way of doing things
and their own world and their own needs and their own funding base.
So that is part of it. Part of it -- it's sort of grown up that way.

Horatio was also thinking about MSU's decentralization when he implied that a

distance education central office can result in less subunit autonomy. Indicated earlier as

an emergent pattern related to mission, MSU's decentralized model was found to provide

relative autonomy for subunits' use of distance education. This autonomy also allows for

creative faculty reward structures based on subunit needs. Horatio contended: "But

really, the sky's the limit if you're entrepreneurial, if you're innovative or you're

creative. There's no central place here that tells you, yes, you can do this or no you

can't." Yaron's comment suggests a similar view:

> **Yaron:** As noted in my response to Question 3, MSU's academic
> units get to make their own decisions about the relative utility of
> distance education and online programs in their own domains
> with respect to their own portfolios of strategic programs and
> efforts. At the end of the day, I believe that this leads naturally
> to far superior choices regarding strategic goals, tactical programs,
> and the use of limited resources to achieve them.

But Sterling, an administrator, warned of decentralization's effect on distance

education curriculum as he neared the end of his interview. He also suggested distance

education regulation appears imminent:

> **Sterling:** I think it's got to be regulated somehow. I think those
> regulations will come down. Right now there's very little regulations.
> Right now, if we decide to develop and deliver an online course that
> has already been approved in the MSU curriculum, nobody ever looks
> at the content of that except me and the instructors. So there's virtually
> no regulation. They are trusting, and I think in most cases it's fine,
> they're trusting the faculty and the departmental level administration
> to assure that quality. And when you think about it, that's what assures
> curriculum quality in the university anyhow. So it's not out of line that
> way, but there's no further check anywhere up the line, whereas in the
> MSU curriculum process -- if we propose a new course -- there would
> be review at the department level, review at the college level, review at
> the provost level, and review in various faculty groups across the campus
> until it was finally approved -- and that's about a year's progress. I can
> offer [an existing course] online tomorrow.

Comments regarding the lack of a central distance education support office,

therefore, indicate that multiple support departments contribute to subunit autonomy,

specialized support (as in the case of MSU Global versus VUdat), and integration of

existing resources. Horatio's and Dillon's concerns about a lack of central support office, however, were not confounded by other study participants.

Chapter Summary

This chapter has discussed the patterns identified in the policy documents in relation to the interview transcript findings and patterns identified in the mission statement analysis. The next chapter presents the components of the grounded theory that were developed based on what emerged from the findings analysis. Chapter Six also includes suggestions on how higher education institutions can better translate the value of distance education into faculty reward structures. Areas for further research conclude the chapter.

CHAPTER SIX

DISCUSSION AND IMPLICATIONS

This study is unique because of its examination of faculty reward policies and practices for distance education efforts in relation to institutional mission at a land grant, U.S. institution. A thorough examination of the literature produced no findings of a study like this that specifically examines the relationship between institutional values and reward structures for junior faculty teaching via distance. The findings from this study can help us understand how distance education is valued, and how it fits into the culture of institutional rewards at a land grant, degree-granting institution in the United States. What emerged from the analysis are the components of the grounded theory developed[32] on how higher education institutions can better translate value regarding distance education into faculty reward structures. The study's contribution to the field, therefore, consists of a more conceptual understanding of the relationship between distance education and the institution.

Overall, study findings indicate that MSU utilizes distance education to generate an alternative source of revenue and remain competitive with other higher education institutions, but varies with regard to faculty reward for, and commitment to distance education efforts across its different academic subunits. At the same time, distance

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[32] Discussion of the grounded theory and its development is included in this chapter.

education is considered an enhancement to the MSU mission due to its ability to provide outreach, increase student access, and provide flexibility for both faculty and students.

How Distance Education's Value Is Translated

The conceptual framework for the study (seen in Figure 2.5) provided a conceptualization that considers the evolution of distance education and its place in U.S. higher education institutions. The framework 1) synthesized the research findings by demonstrating the interdependence of the institution, the administrator, the faculty member, and technology services for distance education; 2) emphasized the increasing dependence on instructional technology; 3) indicated reward practices that have been found to influence distance education teaching participation, including extrinsic and intrinsic rewards; and 4) suggested further exploration of how an institution translates its values and commitment to distance education in relation to reward policies and practices for distance teaching faculty.

Exploration of how MSU translates its values regarding distance education resulted in the emergence of conceptual themes that, for example, expand Slaughter and Rhoades' (2004) and Priest and St. John's (2006) notions about how the public good has evolved as institutions have become modernized. These themes, and strategies for how institutions can translate the value of distance education into faculty reward policies and practices are discussed in sections that follow. Suggested areas for further research conclude the chapter.

Toward a Theory of Translating the Value of Distance Education
into Faculty Reward Structures

Figure 6.1[33] aligns the data analysis for the study with theoretical perspectives

discussed in this paper. In addition, it presents the grounded theory components that

provide a deeper theoretical understanding of translating value into reward policies and

practices for faculty distance education efforts. These components are meant to assist

decision makers with translating the value of distance education into faculty reward

structures at U.S. higher education institutions.

Theoretically, the study analysis demonstrates that values can be translated in a

myriad of ways. Discussion of how MSU does this, and the associated implications

follow.

MSU Priorities, Mission, and DE

Sixty-six percent[34] of the study participants identified the transition of 'land grant

to World Grant by 2012' as MSU's top priority. Three of the seven support staff

members also identified it as the top priority, although thru Boldness by Design, which is

the vision framework for making the transition. Five participants, however, implied that

a more clear World Grant definition is needed. Since study findings indicate that

participants view distance education as an important means for helping MSU meet its

World Grant global mission, a clearer expression of its value to meeting World Grant

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[33]Parks' (2003) grounded theory dissertation on distance education technology included a similar table, but
has been adapted for purposes of this specific study.

[34] This percentage is a combination of responses from Table 3.1 indicating the land grant to World Grant
mission.

Table 6.1   **Theory Reconstruction**

Emergent Categories: Emergent Themes From Extant Text Analysis and Transcript Analysis	Theoretical Perspective Element	Grounded Theory Component
MSU Priorities and Mission: World Grant and Boldness by Design	Market-like activity (Slaughter & Rhoades, 2004); Seeking revenue in support of mission (Priest & St. John, 2006)	Institutional commitment to DE clearly conveyed to public and subunits
MSU Mission: DE increases student access and provides flexibility for students	Institution attending to student needs (Olcott & Wright, Concentric Rings Three and Four, 1995)	Making explicit the importance of DE for students in connection to mission
MSU Commitment to DE: 75% Online Tuition Rule	Market-like activity (Slaughter & Rhoades, 2004); Seeking revenue in support of mission (Priest & St. John, 2006)	Financial commitment; benefits of decentralized budget process
Subunit Missions: DE is not explicit, and lack of familiarity by subunit members	Seeking revenue in support of mission (Priest & St. John, 2006); Benefits of innovation (DE) made clear (Roger's Innovation Theory, 1983)	Re-examination of subunit mission statements; DE's role made explicit; creation if no MS exists
Faculty DE Training and Support: Clear dissemination of support provided by institution and subunit (internal support)	Institutional support of DE faculty (Olcott & Wright, 1995)	Utilization of existing support departments; clear dissemination of DE support departments' roles; clear dissemination of support provided by subunit
MSU Faculty Reward: Decentralized model means relative subunit autonomy	Institutional support of DE faculty (Olcott & Wright, 1995)	Differentiation of reward implementation due to decentralization
Subunit Faculty Reward (Extrinsic), Promotion and Tenure, Junior Faculty: Subunit culture dictates reward	Administrators' roles with reward and subunit cultures (Olcott & Wright, Concentric Ring Two, 1995)	Formal and informal reward structures made clear to faculty
Subunit Faculty Reward (Intrinsic): Valued by faculty teaching via distance	Diffusion process of communication (Roger's Innovation Theory, 1983)	Discussions focusing on intrinsic rewards of DE efforts by faculty

objectives is suggested.

Eighty-three percent of the participants indicated they believe distance education enhances MSU's mission. Numerous participants also directly connected distance education to the outreach aspect of the MSU mission, which is an important aspect of the World Grant mission. Since distance education is a market-like activity that generates an alternative source of revenue, but is also a means for serving the public, institutional commitment to distance education should be clearly conveyed to the public *and* units on campus. As Tomoko argued, a business model at a land grant institution like MSU cannot work if outreach is the goal because then there is a disconnect to the actual educational mission of the institution.

An administrator from Subunit One emphasized that access is the primary motivator for distance education in her subunit. And Serena indicated that the shift from summer-only online courses to fall and spring courses is motivated by mission:

> **Serena:** We have shifted gears from the large sections for the summer offerings to the smaller courses offered during the fall and spring. And we realize we won't make as much money because more of our students will actually be on-campus students, but we are more interested in developing unique classes that interest students.

But even if land grant institutions consider distance education a mere tool for generating revenue and serving the public (as some MSU participants implied), its importance to domestic and global objectives cannot be ignored. Currently, distance education is not explicitly stated in the MSU mission, but the use of innovative means for delivering education to a modern society is suggested. Therefore, in order to better translate the value of distance education to constituents, MSU could explicitly include

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language in its Boldness by Design vision framework that conveys its importance to meeting the 'World Grant by 2012' goals.

When asked about mission, study participants emphasized how distance education increases student access and provides flexibility for students, thus staying close to the land grant mission. And Olcott and Wright's (1995) previously discussed model recognizes the importance of institutions attending to distance education student needs, but fails to connect this to the goals of institutional mission, a means of conveying institutional values. Again, it is suggested that the vision framework clearly convey distance education's value, even if MSU has no intention to include it in its overall mission statement.

Commitment to DE

Study participants indicated that online distance education brings in an alternative revenue source for MSU and its subunits, similar to Slaughter and Rhoades' (2004) idea of 'Academic Capitalism.' Yet, Priest and St. John's notion that revenue is sought in support of mission is also relevant because the 75% Online Tuition Rule helps some MSU subunits stay afloat so they can serve students. The online tuition rule, therefore, clearly expresses MSU's financial commitment to subunits' online education initiatives, while at the same time showcases the numerous benefits of the decentralized budget process that currently exists -- through the varied uses of online tuition in subunits and the discretion allowed in how the revenue is used.

Study data demonstrates that the majority of participants view distance education as a means to serve the public good more than as a vital form of revenue. This suggests a

lack of shift towards Slaughter and Rhoades' academic capitalist knowledge/learning regime and reflects more of a shift toward Priest and St. John's notion of seeking revenue in support of mission. Examination of subunit mission statements, however, revealed an absence of explicit language pertaining to distance education, except for Subunit Two.

One of Subunit Three's faculty members spoke about the subunit's recent examination of its mission statement and strategic plan, which both fail to include distance education even though it brings in vital revenue for the subunit. And nine of the twenty-two administrators and faculty members interviewed admitted unfamiliarity with their respective subunits' mission statement. Given that distance education has been found thus far to enhance the mission of the institution, and provide vital revenue to several of the subunits, re-examination of its role in subunits, including re-examination of its implication in subunit mission statements (whether explicit, implicit, or absent) is suggested.

If we apply Roger's (1983) theory of innovation to distance teaching, the perception of distance education by the institution, fellow faculty members and/or department chairs may be pivotal in whether or not a faculty member decides to instruct via distance. Unless a mandate for distance development and/or teaching exists in subunits, a lack of demonstrating its value can, therefore, result in the failure of obtaining the necessary number of faculty members needed in the subunit for distance education efforts, due to faculty resistance. This can mean lost revenue and lost opportunities for both faculty and students alike. And what was seen in the case, in general, is that distance education's perceived effect on faculty recruitment suggests that more explicit expressions of its value may be beneficial.

Subunit Seven does not have its own mission statement. Rather, it falls under the umbrella of the College of Social Science's mission. This is a subunit, however, that counts on its distance education courses to help educate students in the discipline. In order to better convey the value of distance education to the subunit's goals, it is suggested they create their own mission statement in order to involve faculty in the process and lead to a more unified view of distance education's importance to the subunit.

Faculty DE Training and Support

As noted in Chapter Five, the literature demonstrates that faculty want proper training and technology support for distance education efforts (Olcott & Wright, 1995; Schifter, 2005; Wolcott, 2003). Olcott and Wright's frequently referenced model, for example, emphasizes institutional support for immediate faculty concerns related to distance education, including training and release time for preparation. But as MSU's example demonstrates, subunit training and support efforts are desired as well. In fact, several of the subunits have already employed methods in this direction.

Study participants indicated that MSU provides numerous training opportunities for faculty teaching online and/or blended courses, as well as campus-wide and in-house support for technology initiatives and management. Subunit Three actually employs two online course coordinators, and it was indicated, has a chair who is *very* supportive of all faculty distance education initiatives in the subunit. Subunit Seven has a Coordinator of Distance Education, and Subunit Two has just hired their second in-house technology support person. And years ago, Subunit One implemented an educational technology

training program for faculty, and for students to help better prepare them for future careers as instructors.

In general, support staff members championed the five-department support model, and pointed out how cost effective it is. This is key because cost effectiveness ultimately allows for the 75% online tuition revenue that subunits receive. In addition, several faculty members expressed great satisfaction with some of the support departments. Serena stressed how instrumental VUdat has been to her subunit: "They have been the core of everything we have done [with DE]." And a junior faculty member indicated she is very satisfied with the 24-hour ANGEL support the university provides: "I use the ANGEL support people and they are absolutely fabulous." Concern was expressed, however, that the lack of a central distance education office sometimes causes confusion as to where to go for support. Clear dissemination of support departments' roles is therefore recommended, as is training and support at both the institutional and subunit level (if budgets allow). And this certainly does not negate the benefits of experienced distance education faculty mentors in subunits. Two of the MSU subunits indicated they have such mentors.

MSU Faculty Reward for DE

Examination of MSU and subunit policy documents revealed a lack of written distance education policy for faculty reward. Subunit administrators offered different reasons for this: one administrator stressed that faculty in his subunit don't ask for distance education reward, so a policy is not needed yet; and, another administrator suggested that policies don't build subunit culture. One administrator, however,

indicated that the ad hoc distance teaching mandate that now exists in his subunit means the bylaws should be re-examined because of the mandate, especially in regard to junior faculty. And another administrator, strangely, admitted he/she was unsure if the subunit even had a written faculty reward policy.

Study data also indicate that distance education development and/or instruction's weight in the promotion and tenure process varies across subunits. This differentiation of reward implementation (E. St. John, personal communication, January 12, 2009) in subunits, due to MSU's decentralized model, therefore suggests variation in how distance education's value is translated into reward policy and practice, including for junior faculty. And although Olcott and Wright's (1995) research led them to suggest the need for renewed institutional commitment to faculty, at a decentralized, land grant institution like MSU, commitment to distance education is mainly dependent on subunit culture and its connection to the mission of the subunit.

The Office of the Provost at MSU does translate the value of distance education to subunit deans, directors, and chairpersons in its 'Appointment, Reappointment, Tenure, and Promotion Recommendations' discussed in Chapter Four. Although online or blended learning is not mentioned, teaching and its extension beyond the borders of the campus are emphasized, as well as research, in the policy. Therefore, it appears it is up to the subunits to recognize both traditional *and* distance teaching and development in the promotion and tenure process.

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As was evidenced in Chapter Five, seasoned administrators interviewed for the

study argued that faculty distance efforts count very little in the promotion and tenure

process, if at all at MSU. This implies little translation of its value by the overall

institution, mainly because of its status as a research institution. Yet when asked about

its applicability in *subunit* promotion and tenure processes, numerous study participants

confirmed that faculty distance education efforts do count in their respective subunit's

promotion and tenure process. What is evident in the case, however, is that junior and

associate level faculty members are concerned about how very little it *really* counts.

Clear criteria for promotion and tenure is therefore strongly suggested so ambiguity is

removed. Xavier, a junior faculty member, works in a subunit where distance education

teaching is mandated. In fact, two other subunits have distance education teaching and/or

development mandates. In addition, participants indicated that yet another two subunits

have ad hoc mandates for faculty participation in distance education. Xavier emphasized

the vagueness of his subunit's reward criteria when discussing the mandate in regard to

promotion and tenure:

> **Xavier:** As far as I knew it was the money that was all I was going to
> get for doing this. Since then, I have been told kind of informally that
> because this program is valued so much and because they understand the
> commitment that it takes, that assistant professors in general, but me
> specifically, involved in the process, won't -- it will not hurt their tenure
> and promotion. *I have no idea what that means, I have no idea what that
> means* [italics added].

Thus, formal and informal faculty reward practices for distance education efforts were

apparent among the subunits. Subunit Six, for example, has salary raise

recommendations that suggest the preparation of online courses contributes in important

ways to teaching, and Subunit One provides overload pay if a distance course is taught as

overload. Participants from Subunit Four, however, indicated the absence of direct faculty reward for distance education efforts, although the administrator interviewed from the subunit admitted he/she knows that such efforts take more time and carry little weight in the promotion and tenure process. Graduate students, rather, provide assistance with the distance course development and teaching.

Although many of the participants claimed clear communication about criteria for faculty in their respective subunits, it became evident that criteria regarding distance education development and/or instruction was not as clear as some participants would like it to be. Since subunit culture was found to play a major role in how distance education is valued by a subunit, it is suggested that reward policies and practices be revisited in order to create opportunities for faculty input.

The study focused on faculty reward for distance education efforts, but specifically in regard to junior faculty because of the interesting debate surrounding distance education's applicability in promotion and tenure. Nine of the study participants demonstrated a lack of encouragement for distance teaching by junior faculty members for reasons including its lack of consideration in promotion and tenure, perceived strain on faculty member's time, and even inexperience as instructors. Yet one administrator stressed how younger faculty are more tech savvy, and thus better suited for distance education. And Gayle thinks teaching distance education actually takes less time than teaching traditional courses, and thus is perfect for junior faculty who are very busy trying to establish research agendas. What the data suggests, therefore, is open communication up front in subunits regarding teaching and course development expectations for online and blended courses.

The evidence of formal, informal, or absence of faculty reward for distance education efforts greatly depends on a subunit administrator's support, or lack thereof, for such efforts. Olcott and Wright's (1995) model emphasizes administrators' importance in addressing reward issues, and in setting the climate for receptivity to distance education across the institution and among subunits. Administrators can provide clear dissemination of faculty reward criteria, expectations, and formal versus informal reward practices for distance teaching and development. This can minimize faculty anxiety (especially for junior faculty seeking tenure), contribute to a more collaborative and cohesive subunit (like Lily attests her subunit is), create a more rich environment for pedagogical discussions around distance education (which some participants find exciting and helpful), and focus on the benefits of intrinsic rewards discussed earlier.

Intrinsic Rewards

At the core of Roger's (1983) diffusion process of communication, human interaction affects the transfer of new ideas. If we apply this to distance education, the transfer of new ideas could come in the form of faculty discussions emphasizing the intrinsic rewards associated with distance efforts. Study participants at all levels indicated they receive a variety of intrinsic rewards for distance teaching and/or development. Helene, for example, pointed out that a faculty member in her subunit has persuaded a number of people at MSU to think about developing online courses because of the faculty renewal dimension. William claimed he teaches distance education courses solely for intrinsic reasons, and appeared to be very student-centered when discussing his teaching. He emphasized the importance of pedagogical conversations in this area, and

indicated that one way MSU translates its value of distance education is by providing support from the Office of the Provost for a campus learning community for faculty interested in blended learning. Faculty commit to being a part of the learning community, and the Office of the Provost provides food for the meetings and money for textbooks that can aid faculty in blended learning efforts. William pointed out that during these discussions, faculty transfer ideas about blended instruction, and heighten awareness of intrinsic motivations for distance efforts.

Participants also indicated that MSU has a distance education awards program for innovative faculty, and supports a weekly brownbag session about instructional technology where faculty can showcase their work with technology as part of their teaching. Roger's theoretical perspective suggests just this -- a stable system of individuals working together to achieve common goals. These sessions are opportunities for discussions that focus on the intrinsic rewards of distance education instruction and development. Conversations that cut across disciplines, like those that occur at MSU learning community meetings and instructional brownbag sessions expand the ability to increase faculty awareness and interest in distance education. This can be quite beneficial for subunits that experience faculty resistance to distance education, but want or need additional faculty members that can teach and/or develop these types of courses.

One administrator, in fact, pointed out that the more faculty members in his subunit talk about the intrinsic rewards of distance teaching and development, the more interested non-distance faculty members appear. Discussions that emphasize distance teaching's flexibility, the noted intrinsic value of learning to teach distance education, excitement surrounding the challenge of learning to teach it, and the many more intrinsic

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rewards participants commented about, are highly suggested -- both in subunits and across campus.

The Implications of the Grounded Theory

The reconstruction of theoretical perspectives discussed in this paper resulted in the components shown in Figure 6.1 that led toward a grounded theory of how higher education institutions can translate the value of distance education into faculty reward. The grounded theory suggests that the value of distance education can be better translated if decision makers clearly convey distance education's connection to the institutional mission and missions of the subunits. Moreover, effective policy and practice for distance education faculty reward should incorporate internal stakeholder interests, including that of junior faculty members.

The conceptual framework that initially guided this study suggested that maximum value could be reached if administrators, faculty, and staff shared responsibility and worked together to support distance teaching and development efforts so that institutional goals could be met. Within that original framework, the study was designed to address the research question and sub-questions meant to explore how MSU translates its value of distance education into reward policy for faculty. The exploration resulted in the identification of eleven categories (seen in Figures 3.2 and 3.3) that directly correspond to the initial conceptual framework. What emerged from the study analysis, therefore, is the grounded theory of translating value of distance education into faculty reward. Recommendations for policy and practice are summarized in the section that follows.

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Recommendations for Policy and Practice

1. Institutions of higher education can clearly convey their commitment to traditional and distance education, both to the public and units across campus, in mission statements and strategic frameworks. This can demonstrate commitment to educational offerings, and help to ensure that distance education is identified as one of the educational initiatives for meeting institutional goals and missions.

2. Institutions of higher education that offer distance education courses and programs, and have outreach goals, can explicitly make clear in their mission statements the importance of distance education to these goals. This can demonstrate that institutions are attending to students' needs of access and flexibility in the form of outreach for both domestic and global communities.

3. Financial commitment to distance education by an institution can be expressed to academic subunits. If subunits are asked to offer distance education, but do not receive financial commitment from the institution, subunit commitment to distance education, as a result, may be minimal.

4. Academic subunit mission statements can be re-examined annually to make sure they align with the current goals of the subunit, and that of the overall institution. Ideally, if distance education is utilized to meet any of these goals, explicit expressions of its value can strengthen the purpose of the mission statement for stakeholders.

5. Faculty training and support have been found to be vital to the success of both traditional and distance education initiatives. Clear dissemination of training and support roles can reduce confusion for faculty members seeking assistance.

Institutional training and support departments can also work together, drawing on the strengths of each department to train and provide support for distance education faculty at institutions that lack a central distance education office.

6. If the culture of an institution is that of decentralization and academic subunit autonomy, institutional support of both traditional and distance education faculty reward can still be clearly conveyed in institutional policies and guidelines. Evidence of institutional commitment to faculty reward for distance efforts can influence subunit commitment and clear criteria for faculty reward.

7. Distance education's applicability in promotion and tenure can be in writing, regardless of subunit culture. Vague promotion and tenure criteria produces anxiety and uncertainty, especially for junior faculty. Clear dissemination of formal and informal reward structures can reduce subunit friction, demonstrate administrator support of faculty, and move distance education toward equality with traditional education if that is an objective.

8. Discussions on the intrinsic rewards associated with faculty distance education efforts can be encouraged at both the institutional and academic levels. Showcasing the numerous intrinsic benefits of efforts in this area can increase faculty interest and participation, and increase faculty satisfaction.

So What Does It All Mean?

It was expected that the findings from this study would inform and improve policy development and practice. The findings suggest we have to transform our ways of thinking of faculty reward since faculty distance education efforts are not always

rewarded similarly to that of traditional efforts, or are not made clear in promotion and tenure policies and guidelines. The findings from the study also help us understand how distance education is valued, and how it fits into the culture of institutional and subunit-level rewards at a land grant, degree-granting institution in the United States. As Gappa, Austin and Trice (2007) argue, it is important to find ways to ensure that faculty members are supported in their work and valued by their institutions. Yet the present criteria for rewarding faculty work at many higher education institutions, based primarily on the scientific model of research and publication, can be counterproductive to reaching larger academic goals such as educating a greater number of students and satisfying the changing needs of modern students.

Studies such as this, therefore, inform other institutional initiatives associated with distance education, such as optimizing instructional quality, reaching new markets, better serving markets that already exist, and generating revenue. In addition, the deeper theoretical understanding of reward policy and practice for faculty distance education efforts that was derived from this study can form a basis for additional investigations in this area. The research can also provide a framework for additional studies that can be repeated at other sites in order to increase case study research on distance education faculty, and associated issues, from the perspective of internal stakeholders.

Other practitioners can use this study to analyze their processes of policy development to determine if they need to increase their engagement and discussion among stakeholders to allow issues to emerge and to arrive at some sort of consensus. The relationship between distance education policy and institutional missions can be

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examined further to determine the impact of differing policies (or lack thereof) as distance education offerings continue to increase.

In closing, we are witnessing the growth of technology-mediated communication and the changes in access and delivery of education. The information age is changing the academic life of faculty as well. Judging from the existing literature, institutional rewards for distance teaching and development are not in sync with rewards for traditional instruction efforts at many institutions of higher education in the United States. Whether they should or should not be equitable, and the factors that influence the differences that currently exist are, for the most part, under-researched. This study, therefore, suggests that additional research in this area is needed.

Interview Questions for Administrators:

1) How does Michigan State University identify its priorities and unique characteristics?

2) Does distance education enhance the educational mission of the institution? Please elaborate.

3) Please explain the importance of distance education at Michigan State University.

4) How is Michigan State University's support for distance education reflected in the faculty reward policies?

5) What types of rewards do faculty members receive for teaching distance education courses?

6) Does MSU's land grant status have any bearing on the level of importance it places on distance education?

7) Are you aware of a specific mission statement for the subunit, separate from the institution's mission statement? If so, does it include distance education?
   a. To what extent do you think faculty were involved in the development of the statement?
   b. How else does the subunit convey its commitment to distance education?

8) To what extent are faculty members involved in the development of the reward structure for faculty in the subunit?

9) How is distance education instruction valued in the faculty reward system for the subunit? Please elaborate.

10) How is faculty recruitment in your subunit affected by the presence of distance education courses and programs at MSU?

APPENDIX B

Interview Questions for Faculty Members:

1) How does MSU identify its priorities and unique characteristics?

2) Does distance education enhance the educational mission of the institution? Please elaborate.

3) Please explain the importance of distance education at Michigan State University.

4) How is MSU's support for distance education reflected in faculty reward policies?

5) What types of rewards do faculty members receive for teaching distance education courses?

6) To what extent are faculty members involved in the development of the reward structure for faculty in the subunit?

7) How well do faculty members in the subunit understand the criteria by which they will be judged?

8) In the faculty reward system for the subunit, is distance education instruction equal to that of traditional instruction? Please elaborate.

9) Are you aware of a specific mission statement for the subunit, separate from the institution's mission statement? If so, does it include distance education?
   a. To what extent do you think faculty were involved in the development of the statement?
   b. How else does the subunit convey its commitment to distance education?

10) How are junior faculty members in the subunit impacted by teaching a distance education course(s)?

APPENDIX C

Interview Questions for Support Staff:

1) How does MSU identify its priorities and unique characteristics?

2) Does distance education enhance the educational mission of the institution? Please elaborate.

3) Please explain the importance of distance education at Michigan State University.

4) How is MSU's support for distance education reflected in faculty reward policies?

5) What types of rewards do faculty members receive for teaching distance education courses?

6) Does MSU's land grant status have any bearing on the level of importance it places on distance education?

7) How is faculty recruitment affected by the presence of distance education courses and programs at MSU?

8) Please discuss the most important financial considerations regarding distance education at MSU.

9) How involved are you with the creation and implementation of faculty reward policies at MSU?

10) How are junior faculty impacted by teaching a distance education course(s)?

11) What is the reasoning behind not having an office of online education like Pennsylvania State and Illinois do?

Boldness by Design
Focus Areas and Key Strategies

Drawing upon recommendations made by Boldness by Design task forces and vice presidential areas, Michigan State University had adopted a working list of priority objectives. These focus areas and key strategies provide a framework to advance the commitments of Boldness by Design's strategic imperatives and guide investment and action across the MSU community.

Strategic Imperative 1

Enhance the student experience by continually improving the quality of academic programs and the value of an MSU degree for undergraduate and graduate students

Focus Areas

- The first-year experience
- Active and engaged learning
- Academic and social environments
- Connection between work and academic experiences
- Internationalization of the student experience

Key Strategies

- Prioritize the first year of college as the critical time to introduce students to a rigorous and engaged undergraduate experience
- Enhance transitional experiences, including welcome activities, for first-year students
- Expand opportunities for engaged learning, including research, internships, civic engagement, service-learning opportunities, use of technology, and active learning
- More closely link the undergraduate experience with the world of work through internships on and off campus
- Expand undergraduate living–learning opportunities, including an increase in first-year opportunities
- Support programs, policies, and strategies to ensure liberal learning target outcomes are met

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- Work with student groups and others to generate a greater peer culture of expectations around inclusion, respect, and civility
- Expand and focus global/international content in curriculum
- Increase opportunities for international internships, research experiences, and seminars
- Promote development of intercultural (domestic and international) competence
- Provide multicultural training opportunities to undergraduate and graduate students
- Increase the rate of involvement in study abroad and other international experiences for students of color, students with disabilities, and pre-college students
- Create greater opportunities for students to interact with others who are from different cultures and backgrounds
- Enhance the academic, physical, and social environments to support learning
- Align the resources and support services of the campus to student goals of inclusive excellence
- Make phased enhancements to campus recreational facilities

Strategic Imperative 2

Enrich community, economic, and family life through research, outreach, engagement, entrepreneurship, innovation, diversity, and inclusion

Focus Areas

- Outreach and communication
- Economic development

Key Strategies

- Develop sustained and aggressive programs to maximize MSU's intellectual property estate, identify opportunities for commercialization leading to a diverse portfolio, and support start-ups derived from MSU faculty discoveries
- Enhance communication about faculty research that supports diverse communities, underserved communities, and communities that can be strengthened by the work of MSU public policy researchers
- Expand regional cultural economic development programs to include all areas of the state that promote arts and culture as part of their economic growth strategy
- Expand involvement in community and economic development partnerships to all urban areas of the state
- Create and test new biobased technologies, processes, and products

- Improve communication of public policy work and events
- Promote and reward community engagement of faculty and students
- Expand support for outreach and engaged research
- Continue to build a campuswide network among pre-college programs in order to enhance efficiency and maximize outcomes
- Increase access for Michigan's children to early childhood emergent literacy programs developed by MSU faculty and community partners
- Expand family-related research and outreach

Strategic Imperative 3

Expand international reach through academic, research, and economic development initiatives and global, national, and local strategic alliances

Focus Areas

- International recruitment and retention
- Faculty, staff, and student development
- Depth and breadth of global engagement

Key Strategies

- Sustain and enhance engagement strategies in Africa, enhance engagement strategies in China, and develop strategic engagement strategies for the Middle East and South America
- Increase the number of strategically selected countries in which the university has a formal, long-term presence
- Develop a model for collaborative hiring with partner international institutions to share and exchange faculty resources
- Develop dual degree programs and joint degree programs with partner universities in multiple countries
- Recruit and retain more high-quality international students from more diverse backgrounds
- Enhance international student participation in broader campus activities
- Prepare graduate and undergraduate students for global/international leadership and participation
- Explore feasibility of an international institutional review board for human subject research conducted outside the United States
- Increase access to various models of high-quality language instruction

Strategic Imperative 4

Increase research opportunities by significantly expanding research funding and involvement of graduate and undergraduate students in research and scholarship

Focus Areas

- Research information systems
- Quality
- New research programs
- Targeted investment and promotion
- Undergraduate research

Key Strategies

- Support cross-university, interdisciplinary research initiatives in key focus areas: health and biomedicine, environment, family, bioeconomy, plant science, animal science, and nanotechnology and nanoscience
- Expand and promote targeted research areas that support economic development
- Develop a compelling vision and new funding support for arts and humanities research at MSU
- Engage in continuous assessment and improvement of policies, procedures, practices, and services that promote research activities
- Increase faculty support at the pre-award research stage
- Expand use of advisory groups that include representative stakeholders to monitor progress of research support and to provide input on stakeholder satisfaction
- Complete development of an integrated research administration information system
- Provide training on regulatory affairs and research ethics to undergraduate and graduate students

Strategic Imperative 5

Strengthen stewardship by appreciating and nurturing the university's financial assets, campus environment and infrastructure, and people for outstanding performance today and tomorrow

Focus Areas

- Maximization of endowment and entrepreneurial revenue streams
- Inclusiveness
- Environmental stewardship
- Business procedures stewardship
- Human capital stewardship
- Community safety and security

Key Strategies

- Develop a vision and framework for furthering inclusiveness at MSU
- Create a more inclusive work environment for staff members
- Engage in continuous review and improvement of practices to assure inclusiveness
- Improve the sustainability of MSU campus by reducing inputs, improving the efficiency of processes, and optimizing outputs
- Demonstrate commitment to care, preservation, and enhancement of the campus environment as a public resource
- Build on fundraising momentum and maintain minimum annual gift commitments at the level achieved during the *Campaign for MSU*
- Substantially increase university endowment
- Substantially increase external funding for research, including securing more center, program, and training grants; obtaining support from foundations in the arts and humanities; and developing more corporate partnerships
- Replace the university's financial and human resource management systems to increase efficiency and improve the timeliness and accuracy of information
- Align planning, funding, and assessment practices
- Create expectations and opportunities for continuous learning and leadership development among faculty and academic staff
- Enhance technology capability and support across units
- Enhance computer access and training for labor employees, identify MSU workforce skill and knowledge development opportunities, and work collaboratively to design initiatives and programs
- Provide business procedures training for student organizations and groups

APPENDIX D (CONT.)

- Enhance employee retirement education and advice options
- Develop progressive emergency planning, management, and communications frameworks for the campus
- Enhance general exterior security of buildings and security of selected areas within buildings while maintaining reasonable open access to campus
- Engage in continuous review and improvement of safety in residence halls

APPENDIX E

INFORMED CONSENT LETTER

INFORMED CONSENT

Research Study: Distance Education at a U.S. Public, Land Grant Institution: A Case Study of Faculty Reward for Junior Faculty Who Teach Via Distance

Researcher: Cheryl M. Simpson, Doctoral Candidate, Center for the Study of Higher and Postsecondary Education, University of Michigan

Description of the Research: The purpose of this dissertation research is to add to the research on distance education policy and the process of distance education policy development in higher education. Specifically, this study is designed to understand distance education policy from the perspective of the internal stakeholders -- administrators and faculty. Through the use of semi-structured interviews and document analysis, the research is directed at identifying how Michigan State University translates its values regarding distance education into reward policy for junior faculty who teach via distance. Thus, decision-makers can be better informed.

With the quality of distance education continually being challenged by educators, administrators and policymakers, studies uncovering what factors influence reward practices are certainly warranted. Moreover, if distance education efforts at institutions across the nation are expected to be successful, close examination of policies affecting its faculty are needed. It is expected that the findings from this study will inform and improve policy development and practice, and contribute to the field a more conceptual understanding of the relationship between distance education and the institution. The findings from this study can also help us understand how distance education instruction fits into the culture of institutional rewards at a land grant, degree-granting institution in the United States. A clear picture of why or why not an institution's values are conveyed through its faculty reward practices for distance education instruction is vital for understanding associated institutional policy decisions regarding reward.

Your involvement as a subject: You will be asked to spend approximately 45 minutes completing an interview. The interview will be tape-recorded and the data you provide will be maintained until the conclusion of this study. Note: Tape recording is required for participating in the study. All audio recordings will be deleted at the end of the study, and transcripts of our conversation will be shredded and discarded.

Risks to participation: No risks for participating exist. If for some reason you feel distressed by your participation, please let the researcher know.

Benefits to participation: Although you may not receive direct benefit from your participation, others may ultimately benefit from the knowledge obtained in this study.

Costs to participate: The researcher will bear the costs for this study. There are no costs to you for participating in the study. You will not be compensated for your participation in the study.

Voluntary nature of your participation: Your participation in this study is voluntary. Even after you agree to participate, you may decide to leave the study at any time without penalty or loss of benefits to which you may otherwise be entitled.

Confidentiality of data: No individually identifiable data will be collected. Your data will be assigned a study number, but neither your name nor any other identifying information will be recorded on study records. All data collected as a result of this study will be maintained on a password-protected computer accessible only by the researcher. The responses you provide during the interview will be coded and entered into a database; notes from the study and oral recordings will be destroyed at the conclusion of the study. You will not be personally identifiable in any reports or publications that result from this study. These de-identified study records will be kept confidential to the extent provided by federal, state, and local law. However, the Institutional Review Board or university officials responsible for monitoring this study may inspect these records.

Contact information: If you would like more information about the study, you may contact the researcher:

Cheryl M. Simpson   Faculty Advisor: Dr. Stephen DesJardins
Center for the Study of Higher and Postsecondary Education   CSHPE, School of Education
University of Michigan   University of Michigan
2117 School of Education   2117 School of Education
610 E. University Avenue   610 E. University Avenue
Ann Arbor, MI 48109-1259   Ann Arbor, MI 48109-1259
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EMAIL: csimpsoz@umich.edu   EMAIL: sdesj@umich.edu

Should you have any questions regarding your rights as a research participant, please contact the Institutional Review Board (IRB), 540 E. Liberty, Suite 202, Ann Arbor, MI 48104-2210, (734) 936-0933, irbhsbs@umich.edu

Documentation of the Consent: One copy of this document will be kept together with the secured research records of this study. You will be provided with a copy as well.

Consent of the subject: I have read the information provided here. Cheryl M. Simpson has offered to answer any questions I may have concerning the study. I hereby consent to participate in the study. By signing this document, I agree to have the interview tape recorded by the interviewer.

_____   _____
Printed Name   **Consenting Signature**

_____
Date

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