Transitioning to Online Course Offerings: Tactical and Strategic Considerations

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Abstract

Much has been written about the effectiveness of face-to-face (F2F) versus online (OL) courses, and comparisons of learning and retention across both media, but less has been targeted toward important tactical and strategic considerations. Having little formal guidance to manage the transition to offering a portion of their university courses and programs online, administrators and universities appear inadequately positioned to execute their OL foray effectively. This paper outlines strategic and tactical points to help administrators better manage the transition to offering university courses online.

In today's increasingly competitive educational market, the appeal of online (OL) university course offerings is understandable. Colleges and universities began their entry into online education with the intention of serving students who otherwise would be unable physically to attend classes in traditional classrooms (Bonk, 2002; Owston, 1997). Specific target markets of OL university initiatives have included those living in remote areas whose situational circumstances prevent them from relocating to education-rich locales, those who find it difficult to manage jobs/family along with conventional classes, and those whose jobs impose frequent travel requirements or extensive hours (Symonds, 2001). Increasingly, universities are looking to online education to meet students' desire for enhanced flexibility, such as eArmyU (Conhaim, 2003; Gardner, Sheridan, & White, 2002; Medford, 2004). The recent thrust of online university education is primarily due to a renewed focus on the search for new funding sources and pressure to identify new student markets (Hignite, 2002) as well as to provide richer educational experiences (Twigg, 2001).

Approximately 80 percent of all higher education institutions offer at least one fully online or blended course, and 34 percent offer one or more complete online degree programs (Conhaim, 2003), and several million students take online offerings. Online courses are defined as those where the instructor interacts with students using the Internet, but there are no traditional class meetings (McEwen, 2001). Researchers have investigated various operational (that is, focused and specific) issues in OL education, including student attitudes, learning, and retention to compare the two environments (Bocchi, Eastman, & Swift, 2004; Cappel & Hayen, 2004; Sauers, 2004). Research has primarily concluded that online learning is as effective as learning in the traditional classroom setting (Ali & Elfessi, 2004; Cho & Berge, 2002; Grandzol, 2004; Lu, Yu, & Liu, 2003; Sunal, Sunal, Odell, & Sundberg, 2003; Twigg, 2001), although evidence from both the corporate and academic arenas suggests that the rate of learner attrition is likely higher among distance learners than it is for students taking courses in a traditional

classroom setting (Bonk, 2002; Burke, James, & Austin, 2002; Carey, 2001; Frankola, 2001; Simpson & Head, 2000).

The focus of the current paper, however, is tactical and strategic issues surrounding the management of OL courses in university settings. "Tactical" issues are defined as those that are smaller scale, narrower, and more specific than "strategic" issues, which are an integral part of a larger and more long-term, comprehensive plan of action for the university (Griffin, 2002). Few researchers have explored these types of issues facing university administrators who decide to offer some portion of their courses online. It is argued that universities should consider these points, *prior* to implementation, to improve their venture into virtual course offerings.

Strategic Issues

Strategic thinking refers to planning that integrates an organization's goals, policies, and actions into a cohesive whole (Griffin, 2002). As applied in the present context, a strategic understanding of what a university wants to accomplish, who it wants to serve, and why OL courses are needed, will lead to a more focused, cohesive, and integrated execution in OL education. In other words, university administrators should understand to what extent OL learning is an explicit part of their overall strategy, or long-term comprehensive plan of action (de Verneil & Berge, 2000).

Various questions can help a university determine its strategic focus in the OL realm. For example, from a strategic perspective (Adams & Seagren, 2004), are you trying to attract new students to your school, is the purpose tuition-driven, is the aim to improve educational quality, is the goal to better serve existing students, do you want to improve the institution's geographic reach, or are you entering the market because it seems "industry fashion"? Some universities enter the OL market because it appears to be the "in-thing" and then they just have a vague idea if they are achieving their goals, how many resources to devote to the OL effort, what level of quality they want to deliver, and overall whether their OL efforts have been successful. As such, university administrators need to know how they will measure success upon executing their university's OL strategy. If a strategy is lacking, then identifying appropriate measures will be difficult.

Lane-Maher & Ashar (2001) recommend strategically focusing on one set of OL customers whom you can most efficiently and effectively serve (such as the initial focus of business education at the University of Phoenix). In other words, they believe it is important to first focus on an initial target market before expanding OL efforts. Then, it will be necessary to identify what specific products and services that segment wants. Lastly, Lane-Maher and Ashar encourage universities to reflect on the student segments that the institution does not currently reach and to assess whether online delivery would be feasible for reaching them.

Therefore, engaging in strategic thinking before entering the OL market is needed to understand the "who, what, where, when, and why" of this unique instructional delivery method. More specifically, strategic plans for OL programs should specify:

1) how OL programs emerge from and contribute to the school's mission,
2) how the school's OL programs differ from other providers' offerings,
3) the distinctive aspects of the student population to be served, and

4) the educational goals for each program (Association to Advance Collegiate Schools of Business, 1999).

Ultimately, universities need to be proactive, forward-looking, and act with purpose. Upon discussing and identifying the reason why your university wants to venture into OL learning from a strategic perspective, and the particular audience that would be best to target, the following tactical issues should be considered. Undoubtedly, addressing these tactical points in advance (in addition to the specific technical resources that will be needed, which are not discussed here) will keep a university in the proactive mode.

Tactical Issues

Tactical issues must also be considered when universities enter the online course context. In contrast to strategic issues, tactical considerations are smaller scale, narrower, and more specific. Various tactical issues are presented in the current paper, ordered sequentially (i.e., in a loose order of how they would likely unravel in decision making). As such, the selection of tactical issues for OL course offerings can be equated to a typical project management framework that has a sequence of events that transpire, including recruiting the participants (i.e., faculty), developing the design, producing the plans and specifications, and managing/evaluating the implementation (Seybold, 2001). Each grouping of tactical issues is discussed in turn.

Recruiting Faculty Participants

Selection of faculty. One of the first issues universities will face is which faculty will be recruited and selected to teach online. Selecting faculty who are going to transition into teaching OL can be a tricky business. Should participation be voluntary, mandatory, or some other option? Compulsory involvement in OL courses will likely meet with faculty resistance as they are particularly averse to variants of coercion. Voluntary approaches, where faculty self-select into the OL environment appears enticing, but universities need to be careful here, too.

The author's experience, and more importantly survey results of faculty at one university, suggest that faculty members may self-inflict pressure to move to OL methods so as "to support programs goals of the department or college" ("Faculty Attitude," 2004). Yet, if an instructor is highly successful in the F2F teaching environment, should universities not just leave him/her in that environment to be successful in delivering effective instruction? Put another way, are highly effective F2F instructors also successful in the OL environment? While some authors have made educated guesses that the answer to this question is "yes" ("Faculty Attitude"), a solid base of evidence to make this conclusion is lacking. In fact, some would argue that F2F skills are not transportable to the OL classroom, which necessitates communication and technological skills (Sellani & Harrington, 2002).

Thus, a guided approach to faculty recruitment and selection of OL instructors is recommended. This is a tempered, middle-ground approach in which faculty teaching appraisals and evaluations are examined and discussed between the instructor and department chair. One group to target particularly using this approach is those instructors

who are looking for an alternative method to rejuvenate their teaching performance, looking to update their skills, or perhaps those who are just not that engaging in the F2F learning forum. These instructors may demonstrate an intrinsic desire (versus external pressure) to investigate OL instruction as an option for delivering content they are experts in but which they may not be particularly effective relaying F2F. Thus, the faculty member needs to have some genuine desire to participate. This tactic can be implemented as a voluntary nomination method with supervisory discussion and approval. [Note: It remains an empirical question whether marginal F2F instructors remain marginal in the OL environment.]

Faculty compensation. Once it is known who is going to teach online, an immediate question surrounds how much extra money they will make, if any. It is no surprise that the issue of faculty compensation has arisen in most universities and thus in the literature (Sellani & Harrington, 2002). Some universities are resource-rich and at least have the option of considering additional remuneration for those who undergo the transition to teaching OL given the large amount of time it takes to learn how to teach OL, to prep OL courses, and to execute them, (Carroll-Barefield, Smith, Prince, & Campbell, 2005; Schell, 2004). The challenge exists for public, state universities operating in resource-poor environments, with ever-growing budgetary constraints.

One recent article describing the OL efforts of IUPUI in Indianapolis, Indiana, mentions a $5,000 stipend that most instructors used during their summers to "buy time" (Tarr & McDaniel, 2005). Interaction with colleagues at national conferences has revealed those who boast $10,000 stipends for transitioning their F2F course to an OL delivery; there are also universities who pay OL faculty nothing. Thus, to some extent, the decision on this tactical point is simply, and unfortunately, driven by resource availability. Nonetheless, this issue is one ripe with controversy and the source of frequent administrator/faculty conflict (Sellani & Harrington, 2002). If no remuneration is provided to faculty, the university might expect a somewhat limited OL presence, or potential quality deficiencies, just because few faculty (especially those who are successful in the classroom) may opt to put forth the necessary effort, absent any rewards.

Dealing with this tactical point, administrators should revisit their OL strategy. If the university desires adopting a quality online presence, compensating faculty to some degree seems necessary (Sellani & Harrington, 2002). Put simply, delivering quality OL programs cannot be done "on the cheap." If a marked increase in tuition and student enrollment is your online strategy, faculty may (eventually) desire or arguably even deserve a share of the generated revenue and benefits. However, if your university enters into OL courses only to give faculty an option in methods they can use intrinsic motivation and the desire to improve their skills and instruction may be sufficient. As one case study report indicated, even without substantive rewards, some of the better instructors still have decided to participate in distance learning opportunities (Institute for Higher Education Policy, 2000)

Thus, develop a compensation strategy that is in line with your overall OL course strategy and commensurate with university resources. As such, administrators should note research suggesting OL university education cannot be considered a cost-reduction tool; in fact, delivering effective on-line courses could be even more expensive than traditional classroom courses (Arbaugh & Duray, 2001).

Developing the Design

Training faculty in OL course design. Regardless of whether instructors get paid for their foray into the OL course environment, they should undergo some element of training to learn the OL craft and how to design OL courses. In a preliminary study, Middle Tennessee State University looked at the influence of various factors on OL course quality including: faculty training, technical ability, epistemic tendencies, F2F teaching experience, online teaching experience, content area, tenure, and rank ("Faculty Attitude," 2004). Hence, various faculty-relevant factors impinge upon the ultimate quality of OL courses and so training and support to buttress faculty abilities in the OL environment is important.

There are a multitude of concepts and skills to acquire for OL faculty -- the influence of student learning styles, the technical aspects of online technologies and Web interfaces, the need for pre-communication to online students to clarify expectations, and the additional challenges of appealing to student interest and perceived relevance in the OL venue. All of these issues should be well understood by OL instructors. University training efforts can be quite extensive and some universities are directing many resources into this aspect of their OL strategy. For example, IUPUI boasts a 67-day training and support process that includes instructor access to his/her own team of experts, including a(n):

- Instructional design consultant to help develop course goals, activities, assessments strategies, and
- Copyright consultant to assess fair use, manage permission requests, maintain copyright compliance records, and
- Subject specialist librarian to help with remote access to library materials and designs library instruction for specific courses, and
- Media production staff who create Web interfaces, images, illustrations, video, and audio (Tarr & McDaniel, 2005).

LSU in Shreveport offers an extensive 10-week online training course that helps instructors prepare their courses with activities as wide-ranging as image manipulation, discussion board protocols and usage, and some engagement with learning objectives and outcomes. Other universities have created and maintained a learning and technology center to provide on-site resources for faculty as they navigate the online course environment (Salter, Richards, & Carey, 2004). Such resources are useful for the continued development of faculty skills and abilities to design and deliver effective OL courses.

Surprisingly, in one study of data collected from 81 business professors who taught distance-learning courses at 61 U.S. business schools accredited by the American Assembly of Collegiate Schools of Business (AACSB), authors found that professors primarily used self-training for the design and delivery of online courses (Perreault, Waldman, & Alexander, 2002). This is inadequate and universities must seek to improve their training efforts and support resources for instructors.

Class size & cost. Another design issue is how to cost online offerings and determine OL course caps. Depending upon the level of quality a university seeks in its

overall OL strategy, instructors will be able to effectively handle varying numbers of students in their OL courses. Indeed, class size has been identified in the literature as key to OL course effectiveness and quality (Arbaugh & Duray, 2001). OL courses in some universities, for example, are for all intents and purposes little more than glorified correspondence courses. As a result, the number of participating students is not really bound by any specific expectation of quality. However, if the university enters the OL venue with high expectations for delivered quality, the number of students that can be reasonably handled is smaller (Dumont, 1996).

Related to the effect of class size on quality is the degree of interactivity (Arbaugh & Duray, 2001). For example, the use of electronic discussion techniques, communication media, virtual chats, and emails all work to increase OL course interactivity (MacKinnon, 2002), which is seen as a significant indicator of quality in OL education. Thus, class size influences the amount of interaction in an OL course, and arguably the resulting quality (Vrasidas & McIsaac, 1999). Instructors also typically believe that class size needs to be restricted in the OL environment due to their concern about class prep time and overall workload concerns (Kirk, 2000; Schell, 2004).

The tradeoff of fewer students per OL course, however, is budgetary in nature. For example, if a university pursues a high quality OL strategy, which typically presumes smaller class sizes, then the university needs to consider how it will recoup the extra resources expended per class (or how it will support OL courses with other university funds). In an era of decreased state funding, OL courses open revenue-generating opportunities (Hignite, 2002). One alternative, for example, is that a premium be charged to students enrolled in OL courses to appropriately price the added flexibility the student is afforded in her/his education. Failing to consider budgetary concerns has resulted in some universities giving up their virtual programs as too expensive (Edelson, 2002). Another option would be to increase OL course sizes by increasing student-to-student OL interaction and mentoring, rather than have faculty moderate and respond to each OL posting (Twigg, 2001).

Nonetheless, a universal, magic number for capping OL courses appears a bit elusive in the literature. For one, "online courses" take different shape across universities depending upon the technology used, Web interface, course specifications, faculty training, student population, and university strategy being pursued. Some universities report OL course caps as low as 10, 15, or lower ("Online Class Size," 2000; Sellani & Harrington, 2002). In a recent survey of over 100 universities, Vilic (2004) reports higher OL course caps in undergraduate OL courses, OL courses taught be full-time faculty, and in universities that are public or newer to OL offerings. The average OL course cap reported in the sample was 30 students at the undergraduate level and 28 at the graduate level (Vilic).

At Louisiana State University in Shreveport, online courses are capped at 20 students for graduate courses and 25 for undergraduate courses. However, conforming to these exact course caps can be challenging. First, student demand often supercedes these caps and the concern becomes how many students are getting frustrated because they cannot get into the OL course(s) they want? Consequently, there are a myriad of factors that administrators should take into consideration when determining OL course caps for our various courses, including:

- prior drop rates for the course (i.e., if typically 3-4 students drop, then a slightly higher enrollment cap can be initially in place);
- anticipated student demands (i.e., certain courses are particularly popular for student);
- the level of the course (e.g., graduate courses merit lower caps);
- the type of course (i.e., quantitative require more one-on-one faculty student interaction and thus appear to benefit from small OL course sizes);
- the number of other sections being offered of the same course (e.g., if several other F2F and OL sections of the same course are being offered, then a lower enrollment cap can typically be afforded);
- faculty experience with online teaching (e.g., a faculty member with more extensive OL teaching experience can handle a few more students than a brand new instructor to OL teaching); and
- the number of course preps for the instructor (e.g., if an instructor is teaching three different course preps in one semester, a smaller course cap is likely warranted).

Identifying such factors is necessary at each university, depending upon its own unique situation, OL strategy, student population, culture, and norms. Importantly, Vilic (2004) reminds us that course caps should be consistent with the course goals and the OL program strategy at the university.

Producing the Specifications

Accessibility of OL faculty. An important specification that should be considered when going OL includes the on-campus accessibility of OL faculty to students. If the majority of a university's OL instructors also teach F2F courses in the same semester as their OL course, then this issue is less muddied. But if a faculty member teaches all his/her classes OL, within a mostly traditional academic environment, should that instructor be required to maintain a physical presence on campus?

This is an issue that likely requires consultation of each university's definition of a full-time faculty employee, established policies and norms regarding office hours and faculty leave, and requirements for traditional service and committee work (that necessitates F2F meetings and interactions with colleagues). The traditional policies may not be particularly relevant, however, and so the larger question appears to be: how has the onset of OL education in the university setting challenged the concept, definition, and role of full-time faculty members? For example, if a faculty member can sufficiently meet all his OL course and student needs virtually, as well as, his service requirements virtually, is it fair (or legal) to expect him to maintain some element of office hours on campus each week for other departmental issues that may come up needing his physical presence?

It appears that some universities have not rigorously grappled with this issue and are not prepared to respond adequately. Indeed, a research of the existing published academic literature revealed no substantive discussion of this issue. It is recommended that university attorneys and top administrators, as well as state education boards take a hard look at how the definition of employee should be altered (or not) by the incorporation of OL instruction. Then, formal policies and practices regarding faculty

work expectations, faculty leave, and office hours need to be (re-)written and communicated to faculty to avoid a reactive approach to situations that arise.

Intellectual property rights. From a legalistic perspective, universities also need to consider the necessary specifications surrounding intellectual materials developed for OL courses. There are ownership issues and "right of use" considerations that should be clarified. Written policies should clearly state and communicate to stakeholders the university's position concerning: 1) ownership of materials, 2) rights and editing privileges, 3) distribution, 4) royalties, 5) use fees, and 6) commercial sales of materials developed by employees (Association to Advance Collegiate Schools of Business, 1999).

What if, for example, OL course materials are developed by a faculty member who then moves on to another school? Can the original university use those OL materials if the faculty member is no longer employed; should the ex-employee be compensated? Can the faculty member use the materials at the second university? According to Devi (2002), if universities want OL courses and materials from good lecturers, academic freedom is likely necessary.

Managing and Evaluating the Implementation

Quality control and evaluation. In any project or initiative, one of the final considerations is how to monitor for quality. To ensure that faculty initially and continually host quality classes online, universities can create a quality control mechanism. A cross-discipline university committee can be helpful in this respect. Instructors are asked to submit, present and discuss their course plan, syllabus, methods for using technology, assessing learning, etc. in their OL course. The committee reviews the detailed plan thoroughly and then provides useful oral and written feedback and suggestions to help the instructor make needed changes before the course is officially implemented.

Furthermore, all training and educational interventions should be subject to student evaluation, including online courses. Formative and summative course evaluations can be pursued so that instructors get feedback from student learners, mid-term as well as at the end of the OL course experience. One mistake that some universities make here is to use the same student evaluation instrument for OL courses as they do for their F2F courses. The problem with this practice is that such a radically different teaching method, technology, and student experience requires alternative questioning in order to accurately assess effectiveness of the OL course (Tobin, 2004).

Specific evaluation dimensions that have been generated and tested empirically in OL marketing education, for example, include (Peltier, Drago, & Schibrowsky, 2003):

- student-to-student interactions,
- student-to-instructor interactions,
- instructor support and mentoring,
- information delivery technology,
- course content, and
- course structure.

Peltier, Drago, and Schibrowsky analyzed these dimensions and found them to be significant predictors of the variance in students′ evaluations of the global effectiveness

of their online educational experience. Thus, universities need to take better care of crafting or adopting evaluation instruments in OL courses.

Accreditation issues. Lastly, a similar evaluation issue that is important for schools that are regionally accredited (e.g., Southern Association of Colleges and Schools [SACS], or for specific disciplines that pursue further accreditation (e.g., Association to Advance Collegiate Schools of Business [AACSB] for business schools), is to consider what evaluative criteria these accrediting agencies have for OL courses. For example, some regional agencies require that any academic program that includes more than 50% of its courses online must go through a separate accreditation review. For those universities who provide some portion of their programs online, they need to investigate their regional agency's specifications and integrate this into their OL strategy and execution. In the aforementioned example, a school might decide to put only 40% of courses in a program online and leave the rest F2F to forego the extra review. Interestingly, thirty-five states in the U.S. have statewide virtual universities and of 5,655 accredited academic institutions, 35% offer some form of distance learning programs or courses and of these, 86% hold regional accreditation (Grandzol, 2004). Important to regional accrediting commissions in OL education is the development of communities of learning. Thus, regional accreditation bodies are at least grappling with OL education and its implications in university programs, and at least based on the data above, regional bodies are receptive to OL curricula.

However, discipline-specific accreditation bodies such as AACSB have issued scant formal guidelines. In 1999, AACSB created a brochure entitled *Quality Issues in Distance Learning* with the goal of assisting schools wanting to develop distance learning programs and aiding peer reviewers in evaluating such programs. In the document, they recommend that distance learning programs be consistent with the stated mission of the school and focus on learning outcomes. To achieve high quality in distance learning programs, the 1999 AACSB brochure states that:

-faculty reward systems be structured to encourage faculty commitment; and

-careful attention be paid to learning design and outcomes, effective faculty training, adequate program support, selection of appropriate delivery technology, and a focus on student learning outcomes.

Conclusion and Recommendations

In summary, all of the above tactical issues – including recruiting the participants (i.e., faculty), developing the design, producing the specifications, and managing/evaluating the implementation -- should be formalized among administrative leadership and communicated to faculty *before* entering into OL course delivery, and modified along the way as needed. By applying a project management framework and business-level thinking, university administrators can embark upon OL course offerings in a more informed, reflective, and strategic manner. Of course, this presumes that the overall broader strategic thinking has also taken place, so that tactical issues can be determined consistent with the university's OL strategy. Too often, universities handle such issues reactively and that can produce inadequate results.

According to research, there appear to be certain university structures that are more successful in dealing with the strategic and tactical issues discussed in this paper. Specifically, Edelson (2002) suggests that virtual education demands a structure unlike traditional bureaucratic, hierarchical university models, and that successful corporate and university ventures invoke an organizational design that incorporates localized decision making, absence of hierarchy, culture that support risk-taking behavior, reliance on self-generated revenue, and real-time responses. Edelson further recommends that universities offering OL education should:

- begin with small experiments and rigorously examine the outcomes;
- study the larger environment of success and failure in OL programs;
- promote a supportive environment for risk-taking;
- provide resources for faculty growth; and
- accept that OL strategies must evolve in order to ensure value is being added to the organization.

What is noteworthy about Edelson's perspective is the need for research, study, reflection, and strategic evolution (i.e., strategy unfolds). Given the research training of administrators and faculty in universities, some of these behaviors (such as research and reflection) should come as second nature. However, without a for-profit, capitalistic mindset, universities may lack in strategic considerations regarding their OL curricula (compared to their OL corporate counterparts) and hence how they might need to be adjusted and reformulated.

Lane-Maher and Ashar (2001) write, "Much online literature focuses on instructional or technological dimensions and overlooks the fact that effective management is essential for success" (p. 27). This paper contributes to the literature by identifying broad-level strategic questions that should be answered, as well as more specific tactical issues that should be addressed by university administrators before entering the OL venue, so that the entire initiative is better managed. Further research is encouraged on this topic to provide necessary guidance.

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