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UNIVERSITY OF OKLAHOMA

GRADUATE COLLEGE

DISTANCE EDUCATION POLICY FORMATION

IN STATE HIGHER EDUCATION SYSTEMS:

A CASE STUDY

A Dissertation

SUBMITTED TO THE GRADUATE FACULTY

In partial fulfillment of the requirements for the

degree of

Doctor of Philosophy

By

PHILLIP KEITH MOSS

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DISTANCE EDUCATION POLICY FORMATION
IN STATE HIGHER EDUCATION SYSTEMS:
A CASE STUDY

A Dissertation APPROVED FOR THE
DEPARTMENT OF
EDUCATIONAL LEADERSHIP AND POLICY STUDIES

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ABSTRACT

Prior research on distance education has primarily been concerned with the effectiveness of distance education programs. Although the effectiveness of distance education is increasingly being demonstrated, it remains to a large extent in the margins of higher education. This study examines distance education policy formation and the values and issues that influence the key participants in the process.

An analysis of the policy formation process of the Oklahoma State Regents for Higher Education "Policies and Procedures Pertaining to the Electronic Delivery of Courses and Programs" is presented. As the first state system policy dealing strictly with electronic media and distance education in Oklahoma, it was developed with a great deal of attention and interest from the higher education community. Given the importance of state policy in implementing distance education programs, this study provides an understanding of the context, values, and issues that influence the policy formation process.

This research employed a single case study research design using qualitative data. Drawing on theory from organizational behavior, the policy sciences, and higher

education, the study used data from participant observation, document analysis, and semi-structured interviews with key participants.

Four themes emerged from the data, with another overarching theme that formed a common thread to the four. The overarching theme was a sense of impermanence, uncertainty, and confusion. The remaining four themes were a movement to distance education, a movement to open market competition, a movement to institutional independence, and a movement to new collaborative relationships.

The findings suggest that the values held by those involved in the policymaking process influence both the process and the product. The study further indicates that participants are additionally influenced by their own experiences with distance education or instructional technology and their institutional perspectives. Although the policy framework for distance education in some respects was deemed inadequate, the findings also suggest that key participants recognize and accept that the inadequacy results from the rapid pace of the technological change that has outpaced policy solutions.

CHAPTER I

Introduction

Distance education programs using telecommunications are increasing in number and size as higher education institutions seek to increase access to time- and place-bound learners. These programs provide a service to what Patricia Cross (1974) calls the "new students"--primarily part-time, adult learners. Distance education programs offer these non-traditional students flexibility and convenience.

Research examining factors that make effective and successful distance education programs has focused on the application of learning theory and the technology of instruction (Cookson, 1989). Those studies have revealed the instructional effectiveness of distance education programs when compared to traditional instruction (Moore & Thompson, 1990). In a summary of the literature for the United States Congress Office of Technology Assessment, Moore (1989) concluded:

The weight of the evidence that can be gathered from the literature points overwhelmingly to the conclusion that teaching and studying at a distance, especially that which uses interactive electronic telecommunications

media, is effective, when effectiveness is measured by the achievement of learning, by the attitudes of students and teachers, and by cost effectiveness.

Despite the growing body of research that demonstrates the effectiveness of distance education programs and the increasing examples of successful distance learning programs, much of American higher education has continued to relegate distance learning to the periphery of the academic enterprise, separated from the centrality of its traditional instructional programs (Foa, 1991). As a result, the potential of distance education and telecommunications-based instruction has not been fully realized, and the efforts in expanding distance education have had limited impact.

Some descriptive research has identified institutional and faculty issues that provide a partial explanation. Institutional issues that may be contributing factors include inadequate training, faculty development, faculty rewards, and tenure (Olcott, 1993). Negative faculty attitudes toward distance education have also been an influence. Faculty have questioned the quality of distance learning and its applicability to their teaching areas (Walsh, 1993; Perrin, 1995). Lewis and Wall (1990) identified attitudinal barriers,

primarily those attitudes held by faculty, as being among the major obstacles to increased use and acceptance of telecommunications-based instruction. Others listed were technological barriers and structural barriers.

While faculty and institutional issues have had an effect, state higher education policies have also had significant influence in the expansion of distance education programs. While institutional autonomy ensures that certain educational decisions are made at the institutional level, many educational policies are made and carried out at the state level (U.S. Congress, 1989). Additionally, distance education programs frequently transcend traditional boundaries, requiring coordination among institutions for effective implementation (Holznagel & Olson, 1990). State policies guiding these programs are critical in determining their expansion and acceptance (Hezel, 1991). The policies that constrain and inhibit distance education efforts are among the structural barriers cited by Lewis and Wall (1990).

The convergence of a variety of circumstances has placed the important policy decisions in the hands of state higher education policy-makers. The increasingly available and powerful technology that is being applied

to the educational process is a contributing force. The changing demographics of the student population and the demands for more responsive programs is also worth noting. National initiatives have emerged that are encouraging the development of distance education programs, yet it is the states that continue to have the legal responsibility for providing and regulating higher education.

The increasing demand for distance education programs has also created interest in re-examining the structures of instructional systems (Hezel Associates, 1994) as well as the regulations that were created within the context of the traditional classroom (Baird & Monson, 1992). The promise of information technology presents powerful challenges to higher education systems. As a result, state higher education agencies and boards have appeared ambivalent or confused because of the complexity of the issues surrounding distance education (Mingle, 1987, 1995).

Statement of the Problem

Although the effectiveness of distance education programs is increasingly being demonstrated, distance

learning remains to a large degree in the margins of higher education. Efforts to expand distance education and move it into the mainstream have had limited impact and its potential remains unrealized. An element which has not been explored in analyzing this problem is policy development in distance education. The policy development process in any organizational setting is highly contextual and value-laden (Lerner & Lasswell, 1951), with the values of the participants having significant influence in the development of policy. Distance education efforts within state systems must be conducted within the limits of the policy environment that regulates and empowers higher education institutions. This study examines distance education policy formation and the values and issues that influence the key participants in the process.

Significance Of The Problem

A study of how distance education policies are made within higher education systems is needed to promote understanding and improve practice. Given the importance of state policy in implementing distance education programs, an understanding of the context, values, and

issues that influence the policy formation process may allow policy-makers, administrators, and researchers to further advance the practice of distance education. Although values and context are recognized as influential, there have been few studies that have provided such policy analysis in distance education.

Further, examination of distance education policy formation through process research may contribute to the field by connecting theory and conceptual frameworks from other fields to distance education. Organizational behavior, the policy sciences, and higher education may illuminate the phenomenon that is the focus of this study.

Research Questions

The research questions that guided the current study are:

1. How do the values held by the key participants in the policy formation process guide them in defining policy problems and developing policy?
2. How have the goals that have guided distance education policy decisions corresponded with

the traditional state goals of higher education and the values of the policy actors?

3. What have been the methods of decision-making and how has their relative success or failure been assessed?

Definitions

The definition of Distance Education has been a topic of much discussion among scholars for more than two decades. Moore (1973) was among the first in the United States to formulate a definition. Characteristics included a separation of teacher and learner, and use of technical media. Keegan (1986) listed seven elements of distance education in his definition, adding provision of interactivity as a key feature. For the purposes of this study, distance education will be defined as those instructional efforts in which there is separation between student and teacher in space and/or time that uses some form of instructional technology and allows for interaction.

Policy can be defined in a number of ways, as well. For the purposes of this study, policy will be defined as the

accumulated decisions of a governing body which it employs to regulate and otherwise exert influence within its sphere of authority. Guba (1984) denotes policy defined in this way as policy-in-intention.

The term values describes those beliefs and attitudes that guide individual behavior in the policy process.

Etzioni (1964) defines an organizational goal as a desired state of affairs which the organization attempts to realize. Goals in the context of this study are those broadly-defined desired states of affairs that higher education systems and institutions strive toward.

II. REVIEW OF THE LITERATURE

Introduction

State higher education distance education policies may be examined from a number of perspectives. This analysis will review relevant literature from three areas: organizational theory, higher education policy research and analysis, and distance education policy literature. In each area, there will be an examination of relevant theories and research supporting them.

Organizational Theory

Katz and Kahn (1966) have provided a conceptual framework for analyzing organizational decision-making or policy-making. Policy statements may be retrospective, recognizing a pattern of behavior that already exists, or prospective, providing a generalization about what should be. Prospective policies form a category of decisions that are one aspect of organizational change. Katz and Kahn also cite seven pre-disposing factors in decision-making: 1) determination of thought by social position, 2) identification with outside groups, 3) projection of attitudes and values, 4) undifferentiated thinking, 5)

dichotomized thinking, 6) cognitive nearsightedness, and 7) oversimplified notions of causation.

Etzioni (1961) describes complex organizations using control sources and compliance as a base of comparison. Higher education institutions are considered normative organizations, and are characterized by high commitment from their members and compliance based on internalization of directives. Techniques of control in normative organizations involve the use of leadership, rituals, manipulation of social and prestige symbols, and resocialization. Etzioni also emphasized the concept of cohesion, a positive expressive relationship among two or more members. Cohesion reduced the variation in group members behaviors. Cohesive relationships may be fairly narrow or specific. A relationship between individuals or groups that is cohesive does not necessarily imply shared values or goals. Cohesion, then, will allow for cooperative interaction without the necessity for goal consensus.

Theories relating to structure and communication have also been used to explain how organizations function. Hage, Aiken, and Marrett (1980) have formulated theories related to diversity in

organizations, asserting that as diversity in structure increases, horizontal communication increases. As organizations become more differentiated, the need for reciprocal information among the constituents increases. The nature of inter-organizational coordination is such that it includes both cooperation and conflict, due to the participation of interdependent yet competitive units (Litwak & Hylton, 1969).

The organizational theories of Rensis Likert (1967) provide contrasts among differing types of organizations and their effectiveness. The most effective organizations employ what Likert calls System 4 management. System 4 is characterized by supportive relationships and overlapping group memberships. Additionally, Likert emphasizes group processes and decision-making as important features of highly effective organizations.

Likert addresses problems in coordination among organizational units by providing four conditions for effectively dealing with functionalism and coordination. First, the organization or system must provide for or in some way encourage high levels of cooperative behavior. Second, there must be

organizational structures and individuals with interaction skills to creatively solve conflicts and resolve differences. Third, there must be a capacity to exert influence and create cooperation without the use of traditional lines of authority. Fourth, decision-making processes must allow for participants to make decisions without an overwhelming concern for possible reprisals from others within the organization. This last point is crucial in a System 4 organization, where members may serve under more than one supervisor.

Theory Z (Ouchi, 1981) organizations are similar to Likert's System 4. Both feature participatory decision-making. Theory Z emphasizes trust and consensus among organizational members. There is an egalitarian approach rather than authoritarian. Ouchi contends that Z organizations require a high state of internal consistency and adherence to an underlying set of common values to be effective.

March and Simon (1993) present a conceptual framework of organizations that concentrates on the conversion of conflict into cooperation. Conflict is broken into three classes--individual conflict, organizational conflict, and interorganizational conflict.

Organizational reactions to conflict may be considered analytical (problem solving or persuasion) or bargaining (bargaining or politics). Interorganizational conflict is primarily resolved through bargaining processes, and issues emerge that are concerned with coalitions that are formed and the outcomes of bargaining.

March and Simon also place emphasis on the human factor of organizations that places members above being mere instruments. This is particularly evident in the importance of issues involving communication, interaction, independence. While generally considered within the field of policy sciences rather than organizational theory, the work of Carol Weiss provides insight into organizational behavior, particularly in the analysis of the policy formation process. Weiss (1983) identifies three sets of forces that are influential in the policy process: ideologies, interests, and information. Information includes knowledge, research findings, and information that may be of questionable accuracy or validity, yet still has impact. Interests (primarily self-interests) and ideology (values and philosophies) provide an emotionally-charged and

normative orientation that usually outweighs the impact of knowledge or information.

Higher Education Policy

Higher education policy literature is diverse and examines policy and systems from an institutional perspective, with some studies providing analysis of state systems, governance, and planning. Areas of study include analysis and characteristics of academic systems, the concept of differential functions, goal compatibility, and issues of coordination and conflict.

Academic governance models have been formulated to describe the higher education environment. They include the bureaucratic model, the university collegium, and the university as a political system (Baldrige, Curtis, Ecker, & Riley; 1977). Baldrige et al. argue for the use of the political model, citing higher education's influence by external forces, limits on formal authority, conflict, and fluid participation. Academic organizations differ from others in their goal ambiguity, problematic technology, and professionalism. The political model focuses on the policy formation process

because of its central importance in goal setting, strategies, conflict, and change.

Birnbaum (1988) added to the collegial, bureaucratic, and political models. Beyond those were what he termed the anarchical and cybernetic models. Anarchical institutions are more accurately described as "organized anarchy," with little coordination or control. They are characterized as having problematic goals, unclear technology, and fluid participation. The cybernetic institution is in some respects a form created through the integration of the characteristics of the other models. It utilizes a systems approach, with the organization being largely reactive--responding to inputs through feedback loops that employ both structural and social controls.

State roles in higher education coordination and governance have been examined by Glenny and Schmidtlein (1983). They identified seven areas of state involvement in higher education policy: governance and coordination, access, instruction, research, public service, general support, and accountability. By virtue of their involvement in these areas, states conduct planning,

devise and operate information systems, conduct program reviews, and formulate budgets.

Millard (1980) identified planning, program review/approval, and budget development/review as the three central functions of state coordinating boards. Statewide planning involves a determination of role and scope, translating state goals into institutional missions. Complications arise in resolving institutional goals within state goals. While broad goals make reaching consensus less difficult, goal specificity is necessary in order to delineate institutional missions.

State systems of higher education are concerned with goals and goal compatibility (Baldrige, 1971). Coordination requires reciprocal interaction to produce compatibility of goals (Greer, 1986). Divergent goals among those being coordinated increases the difficulty of coordination, and is exacerbated as the number of actors increases. Because each policy actor formulates the problem definition based on their own context, policy-making is likely to create inter-organizational conflict (Greer, 1986; Mortimer, 1992). Resolution of such conflict requires coordination.

Greer (1986) defines coordination as "the process of achieving harmonious action and compatibility of goals" (p. 30). State higher education coordinating agencies function under operating principles that include protection of institutional autonomy while bringing order to competition through coordination (Halstead, 1974). The models and means for coordination are diverse, reflecting the varieties of circumstances and contexts in coordinate relationships. While control or coordination is necessary in order to maintain diversity among institutions, state higher education agencies generally operate under limited authority to mandate outcomes (Halstead, 1974). Coordination, cooperation, and effective conflict resolution are required for successful implementation of policy (Greer, 1986). Baldrige (1971) uses the term "strategic conflict" to describe the interaction between complete conflict and complete coordination. State coordinating agencies rely primarily on normative means to achieve policy goals, with some use of remunerative means and very limited use of coercive power (Greer, 1986).

An effective system of higher education requires both coordination of the whole and differentiation of the

parts, with institutional diversity as the manifestation of the differentiation (Birnbaum, 1983). Halstead (1974) describes the principle of differential functions as being essential for meeting varied educational needs efficiently through diversified programs. Martorana and Nespoli (1986) discuss the concept of proximity. Proximity is an affinity that develops among institutions that share some common value orientation. As proximities increase, successful inter-institutional cooperation becomes more difficult. As organizations become increasingly similar with overlapping functions, conflict is likely to develop. Policies that are developed from a system perspective will promote institutional differentiation and avoid those policies that influence institutions to become more like one another (Ewell, 1985; Martorana & Nespoli, 1986).

Tierney (1988) advocates the importance of organizational culture in understanding higher education departments, institutions, and systems. While recognizing the influence of external forces, the "internal dynamic" of an organization's culture is at least as important. The influence and contributions of the individuals within an organization should be

recognized and valued within the organization (Tierney, 1997). The diversity of backgrounds and insights increases the organization's ability to adapt to an increasingly complex society that promotes change and innovation over the status quo.

Distance Education Policy

State higher education distance education policies may be examined from a number of perspectives. This analysis will review relevant literature from distance education policy literature. The body of literature relating distance education to state policy is best described as policy research (Hartmark & Hines, 1986). Hezel (1991) confirms this assessment and asserts that distance education policy research has been primarily descriptive. While not classified as research in the traditional sense, the literature can contribute in important ways to the research agenda.

An analysis of the body of literature suggests an organizational scheme that groups the literature into two broad areas: 1) state higher education goals and distance education, and 2) the conflicts and collaboration that arise in distance education. This division is arbitrary

and is presented as a means of organizing the analysis, with the recognition that there is some overlap between them.

State Higher Education Goals and Distance Education

There is a general agreement that distance education and technology will have a significant impact on the fundamental state higher education goals of access, quality, efficiency, equity, diversity, and economic development (Gillespie, Jonsen, & Witherspoon, 1987). State leadership is increasingly more important in addressing these interests because of their complexity and their inter-relatedness. Willis (1994) contends that distance education creates tension in higher education systems, because goal ambiguity characterizes higher education, and distance education programs typically operate under goals and objectives that are more explicit. Clear and concise goals result from both the systematic nature of distance learning and the generally higher scrutiny under which distance education programs operate.

The state higher education goals of economic development, equity, efficiency, and diversity all take

on new meaning when applied to distance education issues (Johnson and Johnstone, 1991). Diversity within higher education systems has typically advocated diversity among institutional types. A system that includes a variety of institutional types--community colleges, research universities, liberal arts colleges, public and private universities--is one that is more responsive to its citizenry by offering choice. Diversity may be expanded from considering diversity of institutional types to diversity in delivery methods, recognizing that choice could include choosing a residential experience, a lecture course, or one delivered using some other technology.

Equity and economic development goals view the higher education system as a resource for providing services to its citizens and promoting growth. States desire systems that are equitable to the various segments of society, while also generating a certain amount of economic development. These issues must be balanced, or the desire for economic competitiveness may lead to exclusion of the economically disadvantaged (Reilly, 1990). A system that is biased toward the economic development goal could serve powerful commercial

interests at the expense of the economically disadvantaged.

Efficiency is a state goal that is generally desired for all state government functions, including higher education. Distance education is frequently viewed as a response to the goal of efficiency, advocating use of telecommunications and advanced technologies to reduce costs and promote more efficient operations. Distance education programs may not promote the goal in the ways some policymakers think (Whittington, 1990), particularly if distance education is considered an enhancement rather than an alternative. Advanced technologies and telecommunications systems can be quite expensive and may only add cost without substantial changes in how instruction is designed and delivered. It is in the discussion of the goals of access and quality that the majority of the literature concerns itself. Some argue that these two goals are in conflict, creating a tension within higher education distance learning programs (Mingle, 1987). Most distance education proponents contend that the goals are not mutually exclusive, but that both are needed (Hall, 1990; Lewis & Wall, 1990).

The issue of access and distance education includes geographic proximity and turf issues (Dively, 1987), but more recently access has been used to describe the time-related concerns of adult learners (McNeil, 1990). By including this idea of delivering education in different places and different times, the goal of access is often related to convenience. Whittington (1990) makes a distinction between the two concepts, and contends that access is an institutional (rather than state) issue, and that convenience is not a state priority. Holznagle and Olson (1990) claim equity and access to be traditionally national concerns.

Quality standards in state higher education policies are of great interest. One of the primary rationales for state regulation of education is to ensure that education programs are of sufficient quality, and that consumers of education services are protected from institutions and providers that are of poor quality. Among the difficulties in discussions of quality are the elusive nature of quality and its resistance to clear definition (Hall, 1990). Distance education has been considered a deviation from the norm of traditional education, and standards of quality have been based on traditional

campus-based learning (Crow, 1991). In that state higher education boards generally reflect the dominant ideas and values that are held by the higher education institutions, state policies most often mirror this perspective (Mingle, 1987).

Despite the difficulty, recent literature has begun to examine the quality issue more fully (Granger & Gulliver, 1994). State regulations promoting quality in distance education are being advocated that are more learner-centered and emphasize instructional effectiveness and assessment of learning outcomes (Reilly & Gulliver, 1992). There has been a renewed interest in developing uniform quality standards, building on recommendations from Project ALLTEL (Chaloux, 1985). Project ALLTEL (an acronym for Assessing Long Distance Learning via Telecommunications) was a project funded by the Fund for the Improvement of Postsecondary Education of the federal government. It was a joint project of the Council on Postsecondary Accreditation (COPA) and the State Higher Education Executive Officers (SHEEO). The project examined issues of licensure and accreditation in distance education, and produced a number of

recommendations for states, accreditors, regulators, and institutions.

Despite the interest, concerns have been expressed in the assumptions that are made about quality in distance education. Steven Crow of the North Central Association for Colleges and Schools (1991) spoke of basic assumptions that appear to be commonly held concerning distance education. These included assumptions about the need for aligning distance education programs with traditional institutions, and the appropriateness of placing the definition of quality in distance education in the hands of traditional faculty.

Conflict and Collaboration

The second broad area, comprised of two related issues, emerges from the discussions of state system goals of efficiency, equity, and access. The nature of distance education programs increases the importance of inter-institutional cooperation and collaboration. Related but converse issues involve inter-institutional competition and territorialism.

Distance education programs and policies are such that while they create opportunities for some

institutions, they simultaneously create threats for others (Holznagel & Olson, 1990). While the Federal government has had influence in higher education primarily through financial aid programs, the states have historically reserved control of education at all levels, and have a strong predisposition against relinquishing it (Goldstein, 1993). State regulation is criticized by some as being burdensome, but there are few who advocate weaker laws governing distance education within the states (Reilly, 1990). Questions have been raised, however, about where control of distance education should reside, and who should perform the functions of coordinating, regulating, and setting standards (Rossman, 1992). Traditional academic governance structures have not made distance education a high priority, giving outside forces a greater role in governance.

State systems are faced with tensions created by the multiple and conflicting roles they must perform. While the state is legally bound to regulate higher education, protecting the public by certifying the programs and institutions that operate within its borders, a state higher education system is also expected to provide leadership and encouragement for innovation in

educational methods and delivery (Callan, 1987). State agencies that serve as both regulators of and advocates for higher education can lose credibility with both the public they protect and the institutions they represent. The same conflicting roles occur within telecommunications as well, making educational telecommunications even more problematic (U.S. Congress, 1989). Adding to the complexity are the presence of multiple governing structures, including state legislatures, governors, and state boards (Olcott, 1992).

The tradition of state regulation of higher education is seen by some to be a significant factor in providing distance education programs that are be delivered to multiple states. The constraints of state-by-state licensure may limit expansion and stifle innovation (England, 1990). Goldstein (1993) contends that states are unable to control distance education programs for both legal and technical reasons.

Educational boundaries, traditionally defined by location and institutions, are changing through distance education (U.S. Congress, 1989). The issue of territoriality perhaps creates the most conflict, with efficiency goals often seen as incompatible with policies

protecting territory (Whittington, 1990). The territorial imperative is reflected in institutional mission statements and purposes (Mingle, 1987), making the potential for distance education to alter or extend service areas an important factor in mission planning. State coordinating agencies' misunderstanding and attitudes of suspicion are aggravated when programs cross state lines (McNeil, 1990). The boundary-stretching nature of distance education has also led to an increasing role for the regional accreditors, with states relying on them as the primary indicators of quality (Western Cooperative for Educational Telecommunications, 1995a). Accreditors are also challenged by the disappearance of boundaries, consortial arrangements, and new types of institutions.

Donaldson (1991) has been among the few distance educators to advocate organizational theory as a conceptual basis for research in distance education. The concepts of organizational boundaries, boundary articulation, and domain determination are presented as useful for explaining distance education policies and programs. Organizational boundary characteristics of permeability and containment reflect the extent of

outside influence and internal cohesiveness within an organization. Organizational domain refers to the legitimacy of both organizational programs and delivery methods.

With states and regional accreditors struggling to provide oversight, there are some who are advocating some sort of national authority. The need for comprehensive planning, consistent standards, and broad policy directions that are needed for distance programs to thrive are difficult to achieve without such a centralized educational entity (Granger & Gulliver, 1994). Preemption by the federal government into regulation of distance education could be triggered by the emergence of a strong multi-state or national provider (Goldstein, 1983). The borderless implications point to the need for states to function as units of a nation rather than as sovereign entities (Reilly & Gulliver, 1992).

With such tension and conflict within state systems, the key to distance education is in cooperation and collaboration instead of competition (Granger & Gulliver, 1994). Distance education programs built on coordination, cooperation, and sound policy formation

will have greater success (Gellman-Buzin, 1987). The increasing interest in cooperative planning and coordination in distance education has been hastened by the interaction of limited resources, increased demands for services, and the increasing complexity of alternatives (Baird & Monson, 1992). Collaboration between students, classes, and institutions may necessitate major changes in policy (Thach & Murphy, 1994).

Inequities may be mitigated through collaborative arrangements between business and education, urban and rural institutions, and large and small schools (McNeil, 1990). Additionally, horizontal coordination between peer institutions is advocated (U.S. Congress, 1989). State boards must provide the leadership and facilitate these efforts, building on the cooperative work of the many distance education consortia (Feasley, 1983). Attitudinal barriers such as those at both the institutional and faculty level must be overcome for collaboration to occur (Lewis & Wall, 1990).

The kinds of cooperation and collaboration needed in distance education programs has been promoted for some time, such as those identified in the Project ALLTEL

documents (Chaloux, 1985). There have been renewed interests, with some states adopting uniform information forms. A set of principles of good practice has been formulated and agreed upon by a number of states and consortia (Western Cooperative for Educational Telecommunications, 1995b; Southern Regional Education Board, 1996).

More recently, a few studies have appeared that have begun to examine state higher education policies relating to distance education and telecommunications. In a study of telecommunications policies in three states, Orozco (1991) reported findings that indicated the importance of interagency involvement (cooperation), organizational dynamics, and governmental politics in statewide telecommunication projects. While the study was not specifically directed toward higher education, the conclusions may have applicability in promoting collaboration and in identifying the issues and planning challenges that collaboration creates.

In a study of state higher education executive officers, Hayes (1995) found that most states were engaged in a proactive assessment or planning process related to distance education efforts. One of the

conclusions was that states are "planning- and policy-ready to deal with telecommunications applications in higher education" (p. 76). Some of the findings may also suggest the continued confusion and dilemmas facing state policymakers. Respondents reported finance and cost issues as the primary barrier to distance education, yet also listed cost effectiveness and resource sharing opportunities as advantages. Expansion of service areas was cited as an advantage, and increased competition between campuses as a disadvantage. Another finding had enhanced quality of educational programs given as an advantage of distance education, while the difficulty of maintaining control of quality as a disadvantage. Hayes' descriptive research provides a glimpse of the issues that policymakers are grappling with in developing state distance education policies.

In a 1996 study of educational telecommunications policy in Oregon, Colorado, and Utah, Ketcheson examined organizational responses to statewide policy and planning for distance education. Among her findings was an indication that state policies are lagging behind technological change. Her research further suggested that successful implementation of policies was more

likely when planning is undertaken with consideration of political culture, organizational behavior, and historical relationships. Greydanus (1997) also studied distance education policy in Oregon. His findings suggested that the primary focus of distance education policy was on technology and management issues. Little emphasis was given to educational ends, and more concentrated on the means of distance education.

Although primarily concerned with institutional policy, Olcott (1996) identified "common issues of divergence" between institutional policy and distance education practice. His research suggests that a lack of congruency between traditional academic principles and distance education may be the most significant barrier to more widespread adoption. The issues where this incongruence is evident included residency, faculty instructional autonomy, and promotion and tenure.

Zeller (1995) developed four descriptive, conceptual models to categorize distance education systems by policy orientation: laissez-faire, consortium, coordinating board, and comprehensive. The four models were based on differentiations over the dimensions of eight properties of distance education systems. The policy-oriented

dimensions represented a continuum from limited/narrow approaches to ones that were more broad or comprehensive.

While Zeller noted that the more limited/narrow models (*laissez-faire* and consortium) reflect current status of distance education systems in the United States, three states (including Oklahoma) were mentioned as exemplifying the coordinating board model. This model is characterized by state-level planning, primarily institution- rather than client-driven focus, and some level of mediation between institutions. Among Zellar's findings were an acknowledgement of the inability of existing policy structures to keep pace with the technological change and the need for academic (rather than technical) personnel to take on an expanded leadership role in distance education systems.

In a study of state distance education policies in Colorado, Maine, and Minnesota, Epper (1996) reported an increased awareness of policymakers to competitive forces and a movement from a "product concept" to a "marketing concept." Additionally, state goals related to access were more often promoted through the application of comprehensive policy approaches for distance education. A third finding related to statewide coordination, with

distance education challenging and in some cases breaking the traditional regulatory principles of coordination. Epper concluded that coordination and competition can and must coexist.

III. METHODOLOGY

Introduction

This chapter describes the methodology employed in the study. It provides a rationale for the perspective and methods, description of data collection, and an explanation of the data analysis techniques that were employed. This chapter also provides explanations relating to assumptions and limitations of the study.

Rationale

Policy analysis has been described as "the activity of creating knowledge of and in the policymaking process" (Dunn, 1994, p. 1). It may include an analysis of the impact of a particular policy or the activities that have some relationship to the policy (Gill & Saunders, 1992). A study of the process of policy formation, then, fits within the definition of policy analysis.

The policymaking process can be considered a series of stages that include agenda-setting, problem definition, decisionmaking, and implementation (Heineman et al, 1990). The values and perspectives of policy

actors and stakeholders have significant impact at each stage. The process of choosing among policy options involves allocation of values (Yeakey, 1983), making examination of values an essential element of policy analysis (Dunn, 1994).

The policy sciences or policy analysis are characterized as being multidisciplinary, contextual, and normative (Deleon, 1988). With such importance given to context and values, the adoption of a naturalistic design appears to be the best fit in conducting a policy analysis. Qualitative methods lend themselves to studying the complicated environment in which higher education policies are formed, and may allow the resulting research to be more useful and influential in the policy process (Layzell, 1990). Policy analysis in higher education requires an understanding of interrelationships and organizational values, which has led to an increased use of qualitative methods in postsecondary organizational research (Peterson, 1985). Aspects of educational research for which qualitative methods seem appropriate include theory development, defining important variables, hypothesis generation, organizational structures and problems, and studying new

phenomena (Borg & Gall, 1989). The naturalistic paradigm is particularly well suited to studies of phenomena that are complex and that regard values and context as important (Lincoln & Guba, 1985). Policy and the process by which it is formulated is just so characterized.

Hartmark and Hines (1985) provide an analytical paradigm for viewing research in higher education policy (Table 1). The focus of the research may be of a substantive policy (or its impact) or of the policy context (or its process). Within each focus, there are three levels of the analysis--applied, disciplinary, or evaluative.

Using the Hartmark and Hines model, this study may be characterized as process research, using a disciplinary level of analysis, with the focus of research being on policy context or process. How distance education policies are made within a state system of higher education are examined, with the goal of providing understanding or explanation of the policymaking process. Using James Coleman's classification scheme employed by Crossen and Adams (1982) to classify research on state higher education, the study may be classified as Category III, which

includes both disciplinary and policy research. The results of such studies are descriptive and analytic.

Table 1

Research in Politics and Policy

LEVEL OF ANALYSIS	FOCUS OF RESEARCH	
	Substantive Policy or Impact	Policy Context or Process
Applied	Policy Analysis	Political Feasibility Analysis
Disciplinary	Policy Research	Process Research
Evaluative	Evaluation Research	Meta-Policy Analysis

A case study provides a detailed examination of a single subject, group, or phenomenon using a variety of qualitative methods (Borg & Gall, 1989). In naturalistic inquiries, it is the reporting method of choice that is most responsive to the axioms of interactions, values, and contexts that characterize the naturalistic paradigm

(Lincoln & Guba, 1985). Case study methodology is a common research strategy in policy research, where there is a blurring of the boundaries between the policy and its context (Yin, 1994). According to Yin, case studies are the preferred research strategy when three conditions are present: research questions are in the form of "how" or "why", the investigator has little control over events, and the focus is on a contemporary phenomenon in a real-life setting. The case study as a methodological framework allows for a depth of study carried out in the field, and is particularly useful in studying processes (Baldridge, 1971).

Data Collection

Research Design

The research questions were addressed through a case study of the distance education policy development process within a single state system of higher education -- the Oklahoma State System of Higher Education. The study was naturalistic and qualitative, utilizing case study methodology to examine meanings and values within their contexts. The policy actors or key participants in the policy development process were the units of

analysis. The population in this case were Regents, chief academic officers, presidents, state system staff members, policy committee members, faculty, and distance education administrators.

Sampling Techniques

Lincoln and Guba (1985) describe sampling techniques in naturalistic inquiry as being purposive rather than random. Sampling design emerges during the study, based on serial selection of the sample units, continuous adjustment or focusing, and selection to the point of redundancy. Samples selected may represent cases that are extreme or deviant, typical, critical, politically important or sensitive, convenient, or those that provide for maximum variation. Purposive sampling was employed in order to select a relevant sample to be examined, based on subject availability (opportunistic sampling), proximity to the policy formation process (that is, their level of activity in the process), and influence. Participants were those policy committee members most active in the process. They also were chief academic officers from institutions representing extreme or

deviant views, as well as those representing typical approaches within the state.

Selection of participants interviewed was serial, with initial participants identified from state system staff members involved in distance education policy and policy committee participants from the State Regents' Council on Instruction. As data were collected from the interviews, their analysis guided in the selection of subsequent participants included in the study.

Data Collection Techniques

Data collection strategies used included participant observation, document analysis, and semi-structured interviews. Using these various sources allowed for triangulation of data sources, thereby increasing the trustworthiness of the data. As a member of the distance education policy committee for the state system of higher education, the investigator had access to the committee as both participant and observer. Previous policies, drafts, position papers, correspondence, minutes, and other pertinent documents were analyzed for relevant details. Semi-structured interviews were conducted with selected participants. Open-ended questions were used

and data collected in the form of audiotape recordings and field notes. The data collected included field notes, documents, and transcripts of interviews. As the study unfolded, additional focused interviews were conducted in order to corroborate issues and perspectives.

Trustworthiness

The trustworthiness of qualitative data is often a concern in naturalistic inquiries. Tactics that may be employed to increase trustworthiness in case studies include using multiple sources of data, establishing a chain of evidence, and having drafts of the case report reviewed by key informants (Yin, 1994). Lincoln and Guba (1985) mention triangulation, peer debriefing, negative case analysis, and member checks as activities to promote credibility.

According to Denzin (1989), triangulation is a means of increasing the validity of a research study. Denzin presents four types of triangulation: triangulation of data sources, of methods, of perspectives, and of theories. Multiple data sources and methods (participant observation, document analysis, and

interviews) were used in the study, thereby increasing its credibility and trustworthiness. Further, a case study data base comprised of transcripts, documents, memos, and time frames was developed, establishing a chain of evidence for use as an audit trail of the inquiry. Establishment of such a database makes judgments of transferability possible (Lincoln & Guba, 1985). Additional activities that increased the credibility of the study included peer debriefing (sharing drafts of the case with non-participating others in the field) and member checks (sharing drafts of the case with key informants, participants, and stakeholders). The use of peer debriefing and member checks allowed for multiple perspectives in the analysis.

Data Analysis

The aims of qualitative data analysis in policy research include defining concepts, creating topologies, finding associations, seeking explanations, and developing new ideas and strategies (Ritchie & Spencer, 1994). It is essentially about detection and providing structure and coherence to a phenomenon.

The method of analysis was the constant comparative method (Glaser & Strauss, 1967). Data were collected and analyzed simultaneously. During the process, themes and issues emerged that allowed for sorting, classifying, and coding purposes. As data were collected and analyzed, they were compared with data previously collected and the categories that emerged. As incidents were examined and coded, they were compared to previous incidents. During the process, categories became integrated and their properties made more clear. The categories or themes that emerged serve as the basis for the findings.

Assumptions and Limitations

The research focus of the study is on the policy formation process within a single state system of higher education and is context bound. Generalizability of the findings to another setting is neither advocated nor expected. Transferability of the findings to other settings is left to the judgment of the users of the research.

The study examined the process from a state system perspective. The system includes institutions from three tiers--community colleges, regional universities, and

tiers--community colleges, regional universities, and comprehensive doctoral-granting universities. With a background as a faculty and staff member at a community college, the researcher is most familiar with the community college perspective in issues of distance education, access, and institutional missions. Involvement in state professional organizations, task forces, and committees that include representatives from all tiers may help to moderate any bias toward any one perspective.

Additionally, the researcher's background and history in distance education within the state that is the case under study may be seen as a bias toward findings that may promote a policy process that results in increased distance learning opportunities. While such advocacy might be accurate within the field, the design of the study to include peer debriefing and member checks should lessen the impact of any proactive bias.

During the course of the inquiry, the researcher had a change of position, going from a distance education administrative position at an institution in the system to an administrative position with the state system coordinating agency. Given the focus of the study on

state system policies, the change did not significantly alter the study, except to perhaps increase access to additional data sources. My involvement in the policy process was already well established, and there is no concern that the findings of the study will have a negative effect on my position.

IV. FINDINGS

Introduction

The purpose of this study was to examine distance education policy formation and the values and issues that influence the key participants in the process. The study includes an historical account of the development of the policy related to distance education offerings in Oklahoma and the context of its development. Open-ended interviews were conducted with key participants. Relevant documents such as policy drafts, committee minutes, agenda items, and correspondence were analyzed.

This chapter describes the history and background of Regents' involvement in distance education. In particular, the development of the "Policies and Procedures Pertaining to the Electronic Delivery of Courses and Programs" (Oklahoma State Regents for Higher Education, 1995) or Electronic Media Policy as adopted by the Oklahoma State Regents for Higher Education is described. Additionally, detailed description of the policy formation process and the work of relevant groups and committees is presented.

History and Development of Distance Education Policy

Oklahoma was among the first states to create a state system of higher education with the establishment of a state coordinating board for higher education in 1941, the Oklahoma State Regents for Higher Education (Halstead, 1974). The Oklahoma State System of Higher Education is comprised of 25 publicly-supported institutions, including two comprehensive universities, 10 regional universities, and 13 community colleges. In 1995-96, the system enrolled 216,400 students (Oklahoma State Regents for Higher Education, 1997). The dozen or so independent colleges and universities in the state accounted for another 19,000 enrollments. Given the number of institutions, their geographic distribution, and an estimated population of 3.3 million in 1995 (U.S. Census Bureau, 1998), access to higher education in Oklahoma has not been considered a problem.

It is perhaps such a tradition of system coordination and planning that led the state to be among the first to develop a state system for educational telecommunications. In fact, "distance education" was responsible in part for the state system being established. Among the concerns that led to the

formation of the State Regents was a concern for the quality of educational offerings in extension and correspondence study ("Oklahoma Higher Education Responds," 1986).

Oklahoma has for some time been recognized as a leader in educational telecommunications (Millard, 1991). Beginning with the establishment of the state microwave network in 1970 and extending through the present time with the implementation of the OneNet plan, the state higher education system has been an active player in the field of distance education. Individual institutions in Oklahoma have pioneered telecommunications-based instruction, as well, with the Oklahoma State University Educational Television Services, Rogers State College KXON, and others as examples. Much has changed during the period from 1970 until the present, with the technological advancements far outpacing the expectations of most leaders in higher education.

The entry of Oklahoma higher education into the telecommunications arena grew out of a combination of economic factors and state leadership. There were needs expressed by some of the major industries in the state for additional graduate-level education closer to their

operations. Creation of new campuses did not seem to be an appropriate solution for both economic and political reasons.

Members of the regents' staff recognized the opportunity for expanding the state higher education system through the use of televised instruction. Dr. Larry Hayes and Dr. Thurman White played key roles in promoting the concept, which was adopted by the Chancellor for Higher Education, Dr. E. T. Dunlap ("Educational Outreach Division," 1986). In 1970, the Oklahoma State Legislature directed the Oklahoma State Regents for Higher Education to

establish and maintain as a part of the state system of higher education a system of televised instruction designed primarily for persons living in industrial communities remote from the campuses of colleges and universities and for the interchange of classes and teachers between the campuses of the State's public and private colleges and universities...(59 O.S. 2166)

Thus, the extension of higher education opportunities in Oklahoma through telecommunications was initially made possible because of economic development reasons. Additional legislation gave direction to the Regents to plan a complete state system that would interconnect all colleges and universities in the state,

both private and public institutions, including junior colleges and technical institutes (Dunlap, 1975).

Key policy issues in the early development of the Oklahoma Higher Education Televised Instruction System (TIS or Talkback Television as it was also called) addressed academic issues such as residency and transfer of credit. The plan provided for a free exchange of credit, with courses taken via the microwave network fully transferable among institutions. An academic advisory committee comprised of representatives from each of the graduate credit providers and regents' staff was created to aid in the development of relevant state policies (Oklahoma State Regents for Higher Education, 1977a).

Other early examples of state policies involving televised instruction were related to what we now think of as institutional and technical issues. For example, state policies determined that only regular faculty who volunteered to do so would teach on the system, and that there would be no additional compensation. Technical issues covered under the policy included the requirement that all instruction be conducted "live," with no instruction conducted using videotape. Additionally,

classes offered via the system were required to have students enrolled and present in the transmitting classroom with the instructor.

Many of the policies were intended to allow expanded educational opportunities while keeping the televised offerings from adding instructional costs.

Efforts were made in many areas to stress the equivalency and parity of the experience of the televised instruction student with that of students physically present on the campus. Admission and retention standards, course assignments, examinations, and other academic requirements were specified to be the same for televised students as those on-campus. There was a solid effort at the time to equate the effectiveness of distance learning with traditional on-campus instruction. Such features in state and institutional policies remain, although there is a growing recognition that such policies may be neither justified nor effective (Crow, 1991).

Certain parts of the state system policies were included to foster inter-institutional collaboration and research. Policy statements "encouraged" collaboration, but included no policy instruments (mandates or

incentives) that would have made such arrangements more likely to have occurred. Similarly, research and development activities were expected to be stimulated by the system. Such research activity required approval at the state level, but provided no inducements.

In September 1977, the Regents approved a policy for credit course offerings that was the first to include specific provisions for courses offered using electronic media or other nontraditional methodologies (Oklahoma State Regents for Higher Education, 1977b). The policy statement listed various media and technologies, and acknowledged the growing complexity of the educational process that these technologies would bring. Explicit concerns were related to quality control and the need for inter-institutional coordination. Specific provisions dealt with authorization procedures and criteria for approval. The policy went into effect in the Spring 1978 semester. Revision of the policy in 1981 gained some recognition for the state, with England (1990) citing the revised policy in an analysis of exemplary states.

The Oklahoma State Regents for Higher Education produced a major planning document in 1980 (Hobbs, 1980). Oklahoma Higher Education: Planning for the 80's was the

culmination of a three-year planning process that was initiated by the regents and involved all institutions in the state system. The comprehensive report examined demographics, enrollment trends, faculty issues, programs, finance, and concluded with a number of recommendations. Electronic media were not addressed in the body of the report, but were mentioned in the final section. The potential impact of instructional technology on higher education was listed among those issues which would need to be dealt with more fully in the future.

In 1982, the Regents consolidated all outreach activities by creating a separate division and a new position of Vice Chancellor for Educational Outreach ("Educational Outreach Division," 1986). An Advisory Committee on Educational Outreach was established by the Regents a few months later, replacing a similar committee on off-campus classes. The first interim Vice Chancellor was Dr. Thurman White, who was later succeeded by Dr. Larry Hayes. Creation of the position and division devoted to outreach efforts signaled a new emphasis at the state level.

In 1983, the Regents received new requests from institutions desiring to further offerings using cable TV and satellite. These televised courses or telecourses were commercially-produced programs that typically included videotaped lessons and printed materials. They differed from the offerings of the TIS primarily in that they were not "live" nor were they locally-produced. Regents' staff and the Advisory Committee on Educational Outreach reviewed the requests. In addition to the revised policy, other criteria were considered. The "specific operating principles and procedures for educational outreach activities by means of electronic media" included provisions for orientations, minimum contacts between students and faculty, student services, fees, and class size (Oklahoma State Regents for Higher Education, 1983). Though the policy was revised in the Fall of 1983, these standards and guidelines were not made a part of the official state policy. Regents' staff, however, continued to apply the guidelines when evaluating institutional requests.

Institutional requests to offer telecourses for residence credit during the Spring 1984 semester were approved by the state coordinating board, but were

approved on an experimental basis and restricted to enrollments within institutional geographic service areas. The first state approval for telecourses coincided with the establishment of the Higher Education Telecommunications Association of Oklahoma (HETA), a consortium of colleges and universities. HETA provided a means for institutions to jointly license telecourses from the Public Broadcasting System and other providers. It also coordinated telecourse offerings with the Oklahoma Educational Television Authority (Instructional Telecommunications Consortium, 1993).

One of the most significant events to affect instructional telecommunications in Oklahoma occurred in March of 1985 with the announcement of a grant of \$5.8 million to the Oklahoma State System for Higher Education. ("Access to Excellence," 1986). The W. K. Kellogg Foundation provided what was the largest private gift to Oklahoma education for the purpose of extending educational access within the state. Two other foundations provided significant contributions and the 1985 Oklahoma Legislature appropriated \$2 million. The project was an ambitious undertaking that involved continuing education, leadership development,

telecommunications, and other modules. Enhancement of the state telecommunications network was a major feature of the project.

The Division of Educational Outreach prepared a report on state telecommunications in 1985 that called for significant expansion of the telecommunications system (Oklahoma State Regents for Higher Education, 1985). Although the report dealt primarily with the development of the technical aspects of the system, expansion of educational opportunities would be an intended result, and thus would provide further interest in the policy matters that would accompany the expansion.

The Oklahoma Network for Continuing Higher Education (ONCHE) that was created through the Kellogg grant provided a number of policy forums and opportunities for discussions during the next two years. The Frontiers in Oklahoma Higher Education newsletter that was distributed always included one or more features on what the telecommunications system would be bringing. The Chancellor during this time, Dr. J. A. Leone, had a column in each issue and was outspoken in his advocacy of these new technologies (Leone, 1986).

Toward the end of the flurry of activity that was associated with ONCHE and the Kellogg grant, the regents approved a revised policy for educational outreach (Oklahoma State Regents for Higher Education, 1988). More than an edited revision of the earlier policy, this new policy was organized in a far different manner and was more comprehensive. The standards that had previously been recommendations from staff were now incorporated into the official policy. The policy included a statement of purpose, definitions, and sections on educational standards and statewide coordination. Provision was also made for review of the new policy after the first year.

Educational telecommunications continued to be an area with a great deal of activity in the years following. Each year seemed to provide one (or more) reports from state agencies, legislative committees, or consultants (Office of State Finance, 1989; Oklahoma Televised Instruction System Task Force, 1991; Oklahoma State Regents for Higher Education, 1992; Oklahoma State Regents for Higher Education & Office of State Finance, 1992; Steele and Associates, 1994). In most cases, development of the technology infrastructure was the

focus. A very few gave much attention to the policy issues that would develop with the technology. Those that did seemed to have little or no effect on state policy.

The most recent of these reports (Faculty Advisory Committee, 1995) was a product of a study of the state TIS system by the Faculty Advisory Committee of the Oklahoma State Regents for Higher Education. While the study may have limited usefulness in that it described operations and perceptions about a system that would be phased out in less than a year, there were some systemwide policy recommendations included in the report that could have significance for emerging networks. Most of the recommendations relate to policies that are best addressed at the institutional level, such as faculty rewards, instructional support, and operations. System coordination, planning, and quality control were also mentioned.

The Educational Outreach General Policy underwent some additional revisions in 1990. Many of the more control-oriented features were removed, allowing some institutional flexibility in certain areas and reducing the specificity of Regents' planning functions. Sections

under educational standards related to awarding of credit were modified, and a section clarifying residency requirements was added. Additionally, specific provisions related to planning groups organized by the Regents' staff were deleted. The outreach policy continued to be the subject of study and revision in 1991 and 1992, with the advisory committee continuing to work with the regents' staff in revising the policy.

Over the two decades from 1970 to 1990, the state policy environment had already begun to move in the direction of increasing institutional autonomy in off-campus and electronic delivery. The first policies could be described as quite prescriptive and sought to regulate a number of specific instructional activities. By the early part of the 1990's, the policy framework had begun to loosen, giving institutions both greater responsibility and greater freedom in providing courses and programs using distance education.

The Origins of the Electronic Media Policy

Over the next several months, the Regents' policy governing off-campus offerings (which applied to both traditional off-campus courses as well as those offered

using electronic media) was the subject of much scrutiny. Institutional leaders were feeling the pressure of increasing competition from other institutions, particularly from those who had invested in advanced telecommunications or had begun to extend their outreach programs. Such institutions were viewed as aggressors and contributed to the nervous concern that was growing among the others in the state. A revised policy that would better regulate and control those offerings was thought to be part of the solution, and the policy revision discussions went on for some time. While there was not unanimous support for doing so, it was determined that two policies would be needed, and that the policy governing traditional off-campus courses would be separated from the policy governing electronically-delivered courses.

In the Fall of 1993, the State Regents' Council on Instruction (COI) established a committee to review policies relating to electronic media programs, anticipating the change in state policy that would separate traditional off-campus courses from electronic outreach courses. The COI is the collective body of chief academic officers from all publicly-supported

higher education institutions, and has some 27 members. While the membership of the committee was made up of COI members, there was some recognition that others with expertise in electronic media and distance learning should be involved. A small number of institutional representatives with distance learning or educational telecommunications were added as resource persons to the committee.

In Spring 1994, I began the initial journey into the examination of the policy process by conducting interviews with two of the COI members who would be charter members of the Electronic Media Committee. These interviews were done prior to the committee's initial meeting and key issues and concerns began to emerge even at that early time in the process. The selection of these two was based in part on the involvement of their institutions in distance education. Additionally, they were characterized as being extreme cases. One was rather conservative in his views on distance education, and the other represented a more aggressive and innovative approach.

In the interviews a dichotomy seemed to appear. On one side was a concern for control, regulation, and

restriction. On the other was a concern for expansion of learning opportunities, reaching students, and meeting the educational needs of the citizens of the state.

Neither of the informants interviewed fell clearly on one side or the other based on their comments, but at various times during our discussions the issues would appear and reappear. In fact, each presented both views in the course of the interviews, indicating that their own positions were still uncertain, at least in some aspects of the policy.

Both seemed to be uncomfortable with the thought of greater control by the Regents in areas of institutional policy and procedures. Issues that were to be determined at the campus level included faculty loads, class size, compensation, and evaluation of instruction. One informant stated directly that greater control by the Regents was not wanted, and that "I don't want the regents telling me..." how to do this or that.

In spite of those comments indicating a reluctance to expand regents control, both shared some views that advocated the opposite. There was an acknowledgement of the need for continued use of guidelines related to quality controls, and the need for monitoring of what

instructional programs are being delivered electronically and the locations being served. One member spoke of the state's regulatory power and control, and the consumer protection aspect of the state's responsibility. The negative tone of the comments lead to examples of poor practices and instances where stronger controls may have made a difference in providing a better program.

While bad examples seemed to be presented for the most part, his comments also indicated a desire to expand distance education programs. He stated that "the potential is excellent for improved learning" and made other comments about improved learning opportunities and meeting needs. The other member was even more explicit in advocating expansion of distance education programs, using words like "vision," "increasing access," and "innovation."

There were two rather surprising commonalties that became evident in both interviews. The first was the feeling from both informants that policy alone could not take care of the problems related to turf, territorial issues, and competition. Both commented on several occasions about the need for trust and "good faith" efforts on the parts of the individuals and institutions.

One said that "we've got to trust the ethics of the person, in conjunction with whatever that policy is..." The other was even more expansive in his comments. His strongest statement on that topic was "I don't think you can control it though policy." He also advocated a simple policy ("not sophisticated") as long as the people involved could be counted on to behave in a way that is "professionally responsible."

The second theme that was voiced by both parties was one of advocating or insisting on cooperation among the institutions. It relates to the previous idea about the inadequacy of policy alone and suggests that without a cooperative effort, any electronic media policy will not accomplish much. One member spoke of "being considerate" and "developing working relationships," and talked about coordination and communication among the people involved. The other supported the idea through an emphasis on a shared vision, "start sitting down and working together." Both mentioned sharing resources, faculty, and costs. In closing comments, one suggested what a system would be without the cooperative spirit: "Isolated institutions doing what they want to do anyway."

Also among the concerns was a sense of urgency to develop a policy to guide and govern electronic media offerings. A number of institutions had already entered into this arena and the numbers were growing each semester. Expansion of these programs would be influenced by any policy that would be implemented, so institutional interests were somewhat driven by a concern over how any policy changes might affect their programs and the directions they were to take. There were also some concerns about how unregulated offerings from other institutions might have a negative impact on their own programs and enrollments.

Although there was some sense of urgency expressed and a recognition from both institutions and the Regents' staff of the need to move forward in the development of the policy, there were a number of factors that contributed to a slow start by the committee. A great deal of attention was being given to the off-campus policy by all the COI members, Regents' staff, and the Council of Presidents. Regulation of electronic media or distance learning programs had been removed from the existing outreach policy, and the new policy governing traditional off-campus offerings was being adapted from

what remained. A key component being added to the off-campus policy was the assignment of specified geographic service areas, and interest was high among the leaders of the institutions.

A second factor contributing to the delay in the development of the new policy for distance education was the relative newness of distance delivery to some key participants. In some cases, their institutions had not had much history of using distance education. For others, although their institutions had been using various forms of distance learning for some time, their own knowledge of or involvement in the programs had been limited. In terms of distance education policy formation, the analyses of other states had not identified any models of exemplary policies from which to draw. The novelty of many of the issues that needed to be addressed contributed to a hesitancy in knowing where to begin.

At the same time, coordination of the effort from the Regents' office was constrained in part due to some of the same factors that influenced institutional involvement. While the Regents had been involved in distance learning for many years through the operation of

the state microwave network (TIS), the involvement had been more in the technical operations and management of the system, and less so in the instructional and academic policy aspects of telecommunications-based instruction. Another factor was related to staffing.

The various executive staff positions in the area of educational outreach had over time become vacant and were not filled. As a result, those who were given the responsibility for advancing the effort in electronic media policy development were also responsible for many other programs and policies. Giving time to generate something from a blank sheet of paper about a topic that was relatively new to most of the state was quite difficult when existing programs and daily responsibilities demanded so much of the staff's time and energy.

After several months delay in getting started, the COI's Electronic Media Committee held its first meeting in May, 1994. The committee was presented the initial draft of the new electronic media policy that had been developed by Dr. Cindy Ross, the Executive Vice Chancellor for Academic Affairs for the Regents. Dr. Ross' areas of responsibility included all matters

concerning academic policy, and as with other COI committees, she would provide the primary leadership from the Regents' staff for the committee.

The first draft of the policy featured five major sections and was a significant departure from the earlier policies on outreach in its organization and approach. Part I briefly presented the basis for authorization, purpose, and definitions. Part II was entitled "Statewide Coordination of Planning" and contained the core of the provisions. Part III covered educational standards and Parts IV and V covered fiscal provisions and reporting, respectively.

The most visible change was in the second section. It presented scenarios that described various arrangements that were envisioned to be used in delivering programs and courses via distance education. Under these scenarios, institutional responsibilities and requirements were described, based on inter-institutional relationships and used terms such as *originating*, *sponsoring*, and *crediting institution*. It was through these defining relationships that the policy determined how courses would be approved, delivered, regulated, and

reported. Three scenarios were included in the first draft of the policy.

The section on educational standards borrowed heavily from the earlier outreach policy. There were new requirements added to the list, however. Adequate and appropriate training for faculty engaged in these programs was a new requirement. Other additions included requirements for student access to faculty outside of class times, provisions for student complaints and grievances, and statements concerning copyright and intellectual property.

The section on fiscal provisions also included a new feature that represented a departure from previous policies. While outreach had been considered an important function for each institution in meeting its goals related to instruction and public service, in the new provisions of this draft institutions were expected to achieve "full cost recovery." Distance education courses and programs were to be provided at no additional cost to the state. While the rationale for the inclusion of such wording was to avoid use of limited state resources to develop unnecessarily duplicative courses and programs, it seemed to suggest that the distance

education offerings were somewhere outside the core academic programs of the institutions.

This first draft also represented a significant departure from previous policies concerning regulation and approval. Regents' approval had been required for every course offered off-campus, either those delivered through telecommunications or traditional off-campus courses. Under the provisions included in this draft, institutions would be much more free to offer courses using distance education without seeking separate approvals.

It was this first draft that the committee began to examine and revise. Suggestions early resulted in increasing the numbers of scenarios in Part II from three to five. One addition provided a scenario for Oklahoma institutions offering courses outside the state. A more important new scenario was also added that addressed courses offered and sponsored by a single institution.

This new section (Scenario "C") described offerings that involved a single institution offering courses without significant collaboration with others. It would be this scenario under which most distance education offerings in the state would fall. The opening paragraph

of the section affirmed that geographic service areas would not be applicable in electronic media, although there would be expectations that institutions would cooperate with others and exercise professional courtesy. Offerings under this section would require Regents' approval.

Another significant addition appeared in the revised draft presented to the committee when they met in June. A new paragraph was added to the section describing the purpose of the policy. It added wording related to sharing of resources, enhancing efficiency, and maintaining quality. More importantly, it added a statement that explicitly pronounced that the policy would be for an initial period of three years. The policy was to be considered transitional due to the rapid changes in technology.

There was also new language added to the purpose section. According to Regents' staff, it was added as a "tone setting" measure and reflected the Regents' position toward the need for increased resource sharing and less regulation. The language added included a statement about the Regents' "desire for market place competition." The new statements were questioned by some

of the members. One voiced a concern that it could be a "prospect for huge problems." Another worried that the tone of competition could outweigh the rather mild calls for cooperation among institutions.

As the use of technology to deliver instruction grew in the state, there was an accompanying increase in attention to the policies regulating such courses and programs. The changes in technologies and capabilities in some respects were driving some of the changes in policy. There was a recognition from institutional leaders and the Regents' staff that major policy revisions were needed.

The Off-Campus Policy

After a considerable amount of time and attention, the off-campus policy (the companion to the electronic media policy) was finally presented to the Regents in September, 1994. It had been under revision and discussion by the presidents and the COI for three years, and had received each group's approval earlier in April.

Like the electronic media policy draft being considered by the COI committee, the new off-campus policy had incorporated "full cost recovery" into its

fiscal provisions. That is, it was intended that the off-campus offerings would not be dependent on the use of any state appropriated funds. Student fees and tuition were to completely cover the cost of the offerings.

More importantly, though, the new off-campus policy formalized geographic services areas for each institution. While inclusion of service areas could be viewed as a step backward in terms of increased regulation, it was presented as a significant move toward increased institutional autonomy, consistent with the concept of "devolution of authority" adopted by the Regents in an earlier workplan. Whereas under the current outreach policy any off-campus course required Regents' approval, the new off-campus policy allowed institutions to offer any courses or programs within their service areas without any requirement related to approval or notification. Maps of the state were drawn outlining the service areas for community colleges and regional universities (the two comprehensive universities were not included, given their statewide missions), and each president signed the maps indicating their agreement.

An interesting provision in the policy also provided for what was called "home rule." Regardless of the service areas, if a course was to be offered that was closer to another institution, the closer institution had to agree in writing to the offering. These Off-Campus Agreements required signatures from the presidents of the campuses involved. If a conflict developed that required resolution, the Regents (through the Chancellor) would mediate.

Although the policy had been endorsed by both the presidents' council and the COI, there was concern expressed by some of the Regents when they considered it at their September, 1994 meeting. Most of the concerns were voiced by Regent Robert McCormick. His concerns were directed at the service area provisions and the potential impact on the comprehensive institutions ability to offer courses and programs, the authority that was being given to presidents within their service areas, and the prospect that "home rule" or service areas would be applied to electronic media offerings. Regent McCormick also voiced the belief that in the future there would be no marked difference between traditional and distance education. He suggested a requirement be added

for periodic review of the policy to assure that it remained responsive. Regent Anne Morgan agreed that there would be more problems with electronic offerings, but advocated approval of the off-campus policy as an acceptable solution to a specific problem (Oklahoma State Regents for Higher Education, 1994).

The timelines involved in Regents actions regarding policy adoption or revisions usually follow a certain procedure. First, a policy change is posted at a meeting. Following the posting is a period for comment, and may include public hearings on the policy. At the next meeting, the policy is listed on the agenda for Regents' action. Because of the extensive institutional input over the previous three years, and the fact that the Regents would not meet again until December, the Regents suspended their rules and approved the policy without posting at the September, 1994 meeting. It took effect immediately.

The new policy governing programs and courses offered through traditional off-campus methods had been developed over a rather lengthy period of time. Its adoption and provisions would influence the development

of its companion policy that was to be developed to regulate courses and programs using electronic media.

Adoption of the Electronic Media Policy

While the electronic media offerings were separated from the off-campus policy, the importance of the provisions of the policy approved by the Regents in September became more clear when the Electronic Media Committee met the next week and reviewed the newest version of the Electronic Media Policy draft. Each of the three scenarios dealing with programs within the state now had reference to the off-campus policy in their opening paragraphs. In each case, electronic media offerings were to be consistent with the off-campus policy. In particular, "Scenario C" described a procedure for institutions desiring to offer courses outside their geographic service area.

In the meeting with the Electronic Media Committee, Regents' staff shared that the Regents were concerned that geographic service areas would be confining and would stifle the expansion of excellent programs. Creation of service areas could allow pockets of higher education to refuse to provide needed programs or

services. Staff also reported that the institutional concerns were that some institutions may "out of control," and that service areas would provide some protection.

Committee members began to discuss the implications of the policies, including the impact on institutions and quality of programs in a deregulated environment. Some members were concerned about institutional autonomy in determining local needs, and "violations of territory" by others who may define needs in different ways. Issues of quality and duplication of services were raised. One member observed that the potential was for both high quality programs and the "awfulest mess of non-quality junk" using electronic media.

The full COI approved the revised policy at their meeting on October 6. The most significant changes from the policy presented to the Electronic Media Committee in September were again in "Scenario C." The wording that said there were no assigned geographic service areas for electronic media that had been previously removed reappeared in the version approved by the COI. However, the "home rule" provision requiring signed agreements between institutions when courses were delivered to sites

closer to another institution was also included. Albeit indirectly, the policy was applying geographic service areas to electronic media courses. The next month the policy was approved by the Council of Presidents.

With the basic framework and wording for the policy established and with support from both councils, Regents' staff were responsible for putting on the "finishing touches" and performing final editing. Among the changes to the policy over the next few months included minor changes in the wording in "Scenario C" and the inclusion of a requirement for annual interim reports to the Regents on the policy's effectiveness.

Perhaps the most controversial addition was the inclusion of a new sentence in the purpose section. Added was a statement that the policy was designed to "...balance the Regents' desire for market place competition with its attendant benefits and the need for institutional cooperation..." Given the Regents' previous comments regarding the off-campus policy relative to deregulation and open-market competition, inclusion of the statement was consistent with their earlier position. The addition did not go unnoticed by some members of the committee. One member continued to raise concerns that

the policy was emphasizing competition over cooperation and coordination.

The policy was posted at the April 28, 1995 Regents' meeting. Due to "institutional interest and varying opinions" the Regents would be holding two public hearings in order to allow for public comment. The emphasis on the policy's attempt to balance between regulation and free market competition continued in the both the written overview in the agenda item and in comments during the meeting. Regent McCormick continued to voice concerns about provisions that restricted offerings and seemed to allow institutional 'veto power' over offerings in their service areas. Chancellor Hans Brisch spoke to the need for a policy as a starting place and recognized that there would be some unresolved issues as the policy would be implemented.

The first of the public hearings was held on May 31, 1995. All those making comments at the hearing spoke in favor of the policy. Three members of the Electronic Media Committee spoke, including the committee chair, another COI member, and one of the resource people. Two presidents also spoke. While supporting the Regents' approval of the policy, each of the speakers voiced some

concern about its implementation and the necessity for coordination at the state level. Some were quite strong in their expressions of concern for the apparent movement away from coordinated offerings, particularly related to the open competition and marketplace aspects of the policy. The speakers also gave some emphasis to the transitional nature of the policy and the need for periodic review.

In most of the comments, members of the committee would balance their statements supporting the policy and its positive effects with concerns for institutional integrity and attitudes that might value profit over cooperation and educational quality. As with earlier comments from the committee members, there was a recognition that there was potential for "great good and great harm" depending on an institution's philosophy and its relationship to others in the state system.

Regent McCormick also commented on the transitional nature of the policy and expressed satisfaction that the proposed policy was being characterized as temporary. In his estimation, inclusion of service areas was a "serious mistake."

The second of the public hearings took place on June 28, 1995, the same day as the Regents' meeting. There again were five individuals who made comments before the Regents--two presidents and three members of the COI (including one member of the Electronic Media Committee). Also as before, all were advocating approval of the policy. One of the presidents commented that the policy had received unanimous support from the council of presidents, primarily because of its "cooperative agreement approach." This referred to the provision that required institutions to have agreements signed by the presidents in order to offer courses outside their assigned service areas.

The three COI members who spoke also voiced support for the policy. However, in two of the cases it was somewhat conditional support. Each expressed positive comments, but also made references to the potential problems and uncertainties that could develop. Their remarks addressed both the uncertainties that accompanied the new delivery methods as well as the adequacy of the policy to deal with them.

In the discussion of the agenda item during the Regents' meeting, Regent Fred McCann reported that most

of the comments received in the public hearings had been positive. Regent Bill Burgess explained that the Regents' Academic Affairs Committee had considered the new policy and recommended that the fiscal provisions be "tightened up" as they related to full cost recovery. They advocated that the staff explore different approaches to funding, but otherwise supported its approval. Regent Burgess moved for passage.

Regent McCormick continued to express his opposition to the policy because of its inclusion of geographic service areas. He shared his view that they created "unrealistic boundaries" and would limit innovation. When the motion was voted upon, Regent McCormick and Regent Joe Mayer voted against its adoption, but the majority voted in favor of the new policy.

It had been some time in its development, beginning in part nearly four years earlier when the off-campus policy began to be discussed. After almost two years of specific deliberations focused on electronic media offerings, the State System had its new policy governing distance education. Because of the passage of the off-campus policy in September of the previous year and its applicability to only traditional off-campus offerings,

there had been no policy in the state dealing with electronic media for nine months.

The Committee and Its Work

The work of the committee continued, however. Even with the passage of the policy, there was a growing recognition that the policy would indeed need to be considered transitional. Institutional approaches to distance education were changing quickly, and even if the policy did not require interim reports and a comprehensive evaluation after three years, there would be a continuing need to analyze the policy's provisions and effectiveness in keeping up with the rapid change.

Additionally, the policy was not without its critics. There were members of the Regents who would continue to promote a further movement away from service areas and toward a free market approach. There were also institutional leaders, from both the presidents' council and the COI, who were concerned that the policy was not restrictive enough and was promoting competition over cooperation or coordination. The policy was intended to provide a delicate balance between an open market philosophy and one that advocated greater coordination

and collaboration. Maintaining that balance would require careful and near constant attention, and both those wanting to expand opportunities through distance education and those who were more concerned with setting limits were anxious to provide that attention.

Following the passage of the new policy, the committee continued to meet and discuss the programs and issues involving electronic media. For the most part, the meetings concentrated more on the operational aspects of distance education programs, the operations of the emerging state network (OneNet), and other issues more than on the electronic media policy itself.

OneNet was considered to be the primary technology vehicle that the institutions would be using for their distance education offerings, replacing TIS that had involved most institutions. OneNet had emerged as the state network in late 1995 primarily through the use of some \$14 million made available through a higher education bond initiative (Oklahoma State Regents for Higher Education, 1996). OneNet was the replacement for TIS, with digital fiber optics replacing the older analog microwave technology. Because of the continuing increase in the distance education activities both in the state

and nation, the committee seemed to always have issues to discuss.

Based on the discussions and topics in the meetings, it was difficult at times to tell if the new policy was having any impact on the discussions at all. At the first meeting of the committee following the policy being adopted by the Regents, many of the same concerns were raised, including the competitive challenges, quality assessment, and coordination. One member asserted that the state was entering a "time of change, conflict, and confusion," and that the planning done and policies in place were not adequate to deal with the issues confronting the state system.

Up to this point the committee had been meeting every two or three months, or more frequently when necessary. At the January 1996 meeting the suggestion was made that the committee meet on a more regular basis, and the next month it was announced that the committee would begin to meet on a monthly basis.

Members of the Council of Presidents continued their interest in many of the same issues despite the new electronic media policy. In early 1996, a survey was conducted on behalf of the presidents' Innovation and

Technology Committee. Entitled "Emerging Higher Education Issues Associated with the New Technologies," the survey sought to determine the top issues and concerns within the state system. Development of system-wide goals for the use of technology was the top issue identified in the survey. Other issues in the top ten included accountability, service areas, function assignments, and duplication.

In June the Electronic Media Committee met and as with other meetings, much of the discussion centered on OneNet and the challenges that were appearing as it was being implemented. Questions about management and operation of the new network were numerous. Much of the meeting was spent questioning Mike Erhart, the principal architect and spokesperson for OneNet. Public and legislative expectations were high for the new network and institutional representatives were giving much of their attention to determining how they would use this new tool.

The discussions also turned to issues of control and regulation. There were questions about the location and control of the video switches, the electronic devices that would route video signals across the network.

Members of the committee were interested in how the technology might be employed in regulating the programs and courses that would be offered over the network, who would be in control of the switches, and how the technology might also be used to work around the policies that were to govern electronic media offerings.

At the one year anniversary of the adoption of the Electronic Media Policy in July, 1996, institutions were surveyed and asked to respond to questions about their distance education programs and the impact of the policy. While some indicated that the policy was having a positive effect in some areas, a number of responses focused on the restrictions that geographic service areas imposed on the institutions. A growing number seemed to be agreeing that regulating electronic media offerings using any connection to geographic services areas was becoming increasingly more difficult to defend.

The Electronic Media Committee meetings during the last half of 1996 continued to feature discussions of OneNet and operational issues. Among those issues was a continuing discussion on costs and cost recovery mechanisms for "receive" or "host" institutions. The meetings would invariably also get into other more broad

issues, most often discussions about competition and coordination.

Some of the most lively discussions concerning competition and the free market concept occurred at the COI meeting in October 1996. In the legislative session earlier that year, a number of branch campuses were created by the legislature. The Regents' policies that were developed as a response to the legislation included policy language that seemed to promote an open market philosophy and freedom in decision-making at the new branch campuses that went beyond what other campuses could do. The majority of comments at the COI meeting were expressions of concern over a movement away from coordination and cooperation toward a more competitive model.

The year and a half period that followed the adoption of the Electronic Media Policy was characterized by the continued discussion of the same issues and concerns that predated the policy. Its adoption seemed to have little impact on the nature and topics of discussion in the Electronic Media Committee meetings.

Interviews of Electronic Media Committee Members

In the latter months of 1996, I conducted three more interviews with members of the Electronic Media Committee. Having interviewed two members previously and also having served on the committee, I selected the three based on their leadership on the committee and differing perspectives. All three were COI members rather than resource persons on the committee. They were all active members and had been major contributors to the discussions at the meetings. In the following passages, they will be referred to as Member A, Member B, and Member C.

The first of the three committee members interviewed was from an urban community college. His institution, like many larger community colleges in urban areas, is considered to be progressive in its educational philosophy and instructional delivery.

Member A began the interview with a call for balance in the policy arena, and commented on the general adequacy of the current policy. The hurdles being faced had more to do with campus-based issues rather than limitations caused by policy. "I just don't see that many problems with the current policy."

After having made such comments, he further described how institutions should be collaborating in distance education programs, then cited an example of a situation where an institution had not shown an interest in cooperation. "You have an institution like [college] that doesn't adhere to any policy."

The fiscal implications of the policy decisions became clear early in the interview. "Almost everything is fiscal," he observed. Most institutional concerns for turf, protectionism, and student enrollments boil down to revenues to the institution. The revenues may be from student fees and tuition or from state appropriations based on student credit hour production (enrollments). "I think the constraint is in that we all are kind of in the numbers game...People are scrambling for numbers."

In discussing how institutions could be given incentives for collaborating with others, Member A commented on how the financial arrangements get developed and formalized. The arrangements should be left up to the institutions, but that "maybe the regents staff could give us some guidance on ideas of how to do that." Describing an arrangement, Member A called the other

institutional leader a "friend," and said "we don't want to do the other one in on costs or anything."

At various points in our conversation Member A expressed concern for "a level playing field" (in terms of technical capability) and "a fear throughout the state" about institutions with advanced technological capabilities having an advantage over the others. Technical capability was only part of it, however. He commented that "those...institutions are looking for the free enterprise approach, I would think." While expressing some concern over such an approach, Member A did remark that a more free-market system would have certain benefits to the student or consumer. He quickly added that "you've got to still have some control." Later in the discussion, a free market approach was mentioned again, and as before Member A could enumerate its advantages. He added that the competitive model did not fit well with higher education and would contribute to fragmentation and dilution of resources. He observed, though, that "I think there are some regents that support free enterprise. I'm not sure that the Chancellor doesn't support it."

Member A was open in his comments about the role of the coordinating board and the need for institutional autonomy, and advocated a balance, with perhaps the scales tipped slightly in favor of the institution. He was positive in how the system was functioning overall. "I think right now the climate's the best it's ever been for letting institutions operate. I don't think there are that many constraints on us."

While advocating a continued role in coordination and regulation of offerings by the Regents, Member A admitted to the futility of the Regents in exercising authority over out-of-state institutions. When asked if state institutions were being more constrained than out-of-state institutions by the policy, he said "Probably, probably we are. But I think that's a losing battle."

Member B was the chief academic officer at a small four-year university. Located in a small city outside the metropolitan areas of the state, the institution had little involvement in distance education. While not necessarily described as an opponent to distance education delivery, his perspective was sought as one who was neither seen as a strong advocate.

There was a recognition of the limitations of the policy and the need for change. It was "designed at a certain time and context...which could not have envisioned the implications...or potential." There is a need for redefining basic terms, including quality and cooperation. "With electronics, cooperation takes on a wholly different level of activity." There is a certain amount of "inevitability, the handwriting on the wall" regarding the use of electronic delivery and the need for cooperation.

Member B raised the issue of conflicting views about competition and cooperation. "You've got two different, significantly different philosophies on two ends of the spectrum." He observed that while increased competition would be likely in the short term, eventually greater cooperation would take place. "My question is whether or not you can really afford to engage in competition...Some assets are going to be destroyed in favor of others."

Those advocating the opposite position from open market competition were described as protectionists. "I think the other side may include even counterproductive notions." Such attitudes were developed by historical relationships and philosophies that grew out of

experiences with "fending off external incursions."

Those at that "extreme" are "having a hard time coming around to more cooperative notions."

A number of more basic philosophical issues concerning the state system were raised by Member B. "I think the issue of what strategy you're really going to create for the system is I think the more fundamental question," he remarked. The concept of service areas as a transitional device would continue to have utility "until we settle the more fundamental issues and that is what is going to be our strategic approach?" Higher education itself will require some redefinition. "Then you're going to have to define it in very non-traditional ways of delivery, and that's going to be the next trip, which we're really just now beginning to confront."

In the conversation, there were some comments about the policymaking process within the state system. The COI had primarily been the policymaking group in the system, "until the presidents got into the creation of the committee system." When "the presidents decided they were going to form their own kind of policymaking groups, that complicated things considerably." He added "once

those kinds of issues get to the presidents, they're worked out politically."

Member C is the chief academic officer for a regional four-year institution. His institution has for some time been involved with distance learning, and more recently had begun new initiatives related to instructional technology. Under his leadership, a new instructional support unit had been created. His own knowledge and use of technology was evidenced during the interview as he spoke about the development of the campus web pages and other technologies. In the middle of the discussion, he demonstrated his use of email for communicating with faculty and students. At various times in the interview, he would provide examples of innovative uses of technology, and commented at one point that "we could really create some wonderful experiences for our students."

While beginning the conversation with a statement that the existing policy "needs to be changed," he quickly brought up his view about the kinds of changes needed. "My belief is that distance learning as such is going to disappear. The way we deliver instructional services to people on campus will merge with the way we

deliver instructional services to people off campus." Because of this blurring of distinctions, distance education policies should "be as much like the policies that govern campus policy as possible."

Member C also expressed the feeling that certain changes are essential. Service areas, for example, "cannot continue to exist." He did not envision an elimination of campus-based learning, but commented that "there's going to be considerable change in the way we use campuses, and the purpose for which we come to the campus."

He also reflected that "I am not one who believe that historically distance learning and campus learning have been equal, have been the same." Evidence for his belief included examples of how distance education had been "in the margins" of the campus organization. Distance learning courses were usually overload for faculty, giving the impression that it was not a central part of the faculty's work. Likewise, the distance learners were not usually considered as "regular" students on campus.

Member C's comments on competition and cooperation were of interest. He advocated that "we should move away

from regulation" and recognized that under the present funding system "institutions are forced into a competitive mode." He also commented that part of the problems related to "our ability to think about how to deal with [collaborative models] and how to make the best use of the technology we've got." The kinds of competition in which institutions are engaged, however, has led to concerns for quality. "If you could somehow take the competition out, and we're all working together,...then the quality concern's not there. Quality will arise out of the cooperation, not out of the competition."

Summary

This chapter presented an historical account of the development of the policy related to distance education offerings in Oklahoma and the context of its development. It provided a detailed description of the process involved in the creation of the Oklahoma Electronic Media Policy as adopted by the Oklahoma State Regents for Higher Education in 1995, and described the work of relevant groups and committees. Also included in this section were the summaries and descriptions of interviews

with three COI members who served on the Electronic Media Committee.

During the time period covered in this analysis, a number of key issues and perspectives emerged. From the perspective of the Regents, there appears to have been a trend toward less centralized control and deregulation of higher education. Institutional perspectives were mixed, with some favoring tighter controls through adherence to service areas, for example, while others advocated a more open approach to educational delivery mechanisms.

V. THEMES

Introduction

In the course of the study, several themes emerged from the collection and analysis of the data. Examination and analysis of relevant documents such as policy drafts, memoranda, agenda items, committee and other meeting minutes, and correspondence contributed to the identification of these themes. Participant observation in meetings and analysis of interview data also aided in their clarification.

In organizing the emergent themes, a common thread was discovered that seemed to connect them. An overarching concern or observation that became evident was one that describes the times and situations as transitional, uncertain (or chaotic), and non-permanent. This was voiced by members of the committee, presidents, Regents, and Regents' staff. The times were variously described as being "difficult territory," "uncharted waters," and open-ended. As such, the system is in a period of "change, confusion, and conflict" in which those in decision-making positions will "grope our way through."

The Electronic Media Policy itself is transitional. Within the policy language that makes up its provisions, the policy is for a period of three years "due to the continuing, rapid advances in technology." Further, the policy also suggests the uncertainty of the times by stating that the technology "raises multiple, unresolved questions" that will require "continual reassessment." Comments by Regents, staff, and other key participants also emphasized the impermanence of the policy and the need for its evolution. One COI member summed up both the transitional and chaotic aspects by stating "In the meantime, the policy is needed to maintain a semblance of civility in an increasingly chaotic portion of our mission."

Within the overall framework of impermanence and uncertainty, four themes emerged that relate to the theme of non-permanence or transition. The first three of these themes are: the movement from traditional education to distance education, the movement from a regulated and coordinated system to one that is more competitive and open-market, and the movement from state-level control to more institutional autonomy and independence. Each of these three movements is in progress.

The fourth theme is more difficult to describe, although the data from which it emerged was more voluminous. It is also seen as a movement that needs to occur or is just beginning to occur - a movement involving institutional attitude and relationships. This movement is one that is a progression from old ways of defining inter-institutional relationships to new ways of collaboration and cooperation.

Movement to Distance Education

Higher education is in transition from being a system of providers of traditional, residential-experience education to one that uses electronic media to deliver distance learning. While distance education programs and offerings continue to grow, they remain for the most part "in the margins," and are seldom considered in the central core of an institution's work. The Electronic Media Policy itself reinforces that philosophy by requiring that electronic media courses and programs be offered on a "full cost recovery" basis. That is, the state subsidy for on-campus programs is not extended to these "other" programs. It is this way despite statements that extension and public service, two

integral parts of institutions' missions, are often advanced through use of distance education programs. This discrepancy also suggests that the system is in transition.

The promise and potential of distance education and telecommunications is touted by virtually all within the system. Its ability to improve higher education delivery and transform its functions appears to be well-recognized. Yet in part because of the wide variation in institutional capabilities and capacities, it remains more potential than reality. As one participant commented, it is a "small part of our work" that is not tightly connected to the total academic program of institutions. The "full cost recovery" requirement attests to that. One committee member suggested removing distance education courses from the enrollment figures used in the formula that determines institutional budgets.

It is also important to note that there is a growing recognition that the distinctions between distance education and the traditional educational experiences on campus are beginning to fade. In his remarks when the Electronic Media Policy was under consideration, Regent

McCormick offered that in the future there would be "no marked difference" between distance education and traditional education. The members of the committee also expressed this view on numerous occasions.

The transition was also expressed in two other ways. Although geographic service areas (GSA's) remain a feature of the state higher education system and are indirectly a part of the Electronic Media Policy, the majority of the COI members interviewed as well as others in the system see them as inapplicable and inappropriate for distance education. Even before the committee met for the first time, one member stated "I don't think we can live with a policy that restricts delivery of electronic media to service areas," but also noted that "it may come to that."

The transition to distance education also suggests a transition in definitions and determinations of quality. Quality is "critical" or "the biggest issue we face." There is an uncertainty about how quality will be maintained in a system that is outside the classroom walls and somehow beyond the control of the faculty. One committee member even questioned whether "quality can exist outside the traditional classroom."

Movement to Open Market Competition

Among the most animated discussions and remarks were those addressing the application of so-called open-market or free-market competition principles to the state higher education system. Members of the committee, COI members, presidents, and Regents themselves were quite vocal in expressing their views on this topic.

In some respects, this transition is also specified in the policy language. In the purpose section of the policy, it speaks of a balance in the Regents "desire for cooperation with the virtues of a free market." This balance is promoted by Regents, staff, and other key participants. However, not all are comfortable with the equilibrium that exists. Committee members spoke of the "problems and anxieties" created, and one questioned the advisability of combining two opposing theoretical structures (a cooperative, coordinated system and an openly competitive market).

Institutions have competed with one another for some time. While in some ways the competition has been subtle, in other ways it has been quite direct, as in the case of student recruitment and athletics. Two recent developments have contributed to the heightened concerns

for higher education as a competitive market. The first is the availability through broadband technology networks for institutions to reach students economically and effectively with less regard for physical location. The second is a growing consumerism among students and a more student-centered philosophy growing on campuses. Institutions are changing and becoming more responsive to student demands for services and programs.

These competitive forces have produced concerns among most institutional representatives and have also raised the awareness of competition from providers outside the state. Defining unnecessary duplication, community and learner needs, and access are key issues. While concern is the sentiment the most often expressed by institutional representatives, there are also advocates for this movement, most notably found within the Regents, the comprehensive institutions, and in a few other institutions.

Reducing the duplication of programs and course offerings within the state system has been a goal of the Regents for some time. It is manifested perhaps most clearly in the Regents' Academic Planning and Resource Allocation program or APRA (Oklahoma State Regents for

Higher Education, 1991). Critics of a more competitive system most often point to the inefficiency of using scarce state resources to develop and deliver duplicative offerings in a given area or market. Advocates admit that there may be some inefficiency for a period of time, but that over time the best programs will survive.

Those promoting a more open-market approach point to the advantages such a system would present to the learners. A wider range of educational programs would be available with less regard for geographic considerations. The artificial nature of service areas would no longer contribute to stifling the expansion of excellent programs. There was a recognition that a more open market approach would benefit institutions in their ability to compete with institutions outside the state system.

Those most troubled by this transition offered some of the strongest language in their statements presenting their position. Such an approach would present "huge problems" and have the effect of "diluting and fragmenting" the state system. A wide-open system would be a "foolish waste of resources" that would result in a "free for all" of intense conflict and "dog-eat-dog"

competition. It would contradict the philosophy of efficiency embodied in APRA and even question the necessity of a state coordinating board.

An additional issue that emerged within this movement related to the definition of access. One of the broad policy goals for the Regents is for a higher education that is widely accessible. Consumers are also interested in access to higher education services. Those who were most critical of the movement to a more open market approach seemed concerned with applying limits to convenient access. Institutions operating in an open system would be less likely to concern themselves with meeting "legitimate needs" or would otherwise offer programs "under the guise of convenience."

Movement to Institutional Independence

The third theme describes the movement away from state control of institutional affairs to greater autonomy and independence. The Regents have for some time been promoting the "devolution of authority" in decisions and policies. In defining and determining quality, in determining needs, and in establishing

collaborative efforts, institutions have been enjoying increasing responsibility.

Pushing decision-making to the institution level has been greeted with enthusiasm from institutional representatives (in one of the public hearings for the electronic media policy, one representative told the Regents "Bless you. "). The movement has given institutional leaders greater flexibility in responding to the needs of its students, communities, and business and industry. Regents' approval is no longer a requirement for a number of actions. There is also less centralized control from the state network operated by the Regents. Institutions have a much greater role in both technical and programmatic matters on OneNet than they had with the older Televised Instruction System.

The decrease in centralized control is recognized by many participants as a result (at least in part) of the limitations of the effectiveness of state policy. Regents policies may not restrict out-of-state providers by enforcing policies that prevent competition, and their authority is also limited in regulating educational programs offered by independent colleges and universities, on military bases, and at corporate sites

within the state. One member of the committee spoke about the Regents' "inability to control aliens" and another said the Regents were "whistling Dixie" if they thought they could control out-of-state providers.

An additional aspect of this movement was tied to the recognition of the technology and its effects on control. Telecommunications (and distance learning) are less easy to regulate by policy given their capabilities to transcend political boundaries. Artificially limiting technology in certain areas was described as being impractical, indefensible, and perhaps impossible. The operation of OneNet provided participants with concrete examples of the loss on central control. Although some of the network's technology might reside on campuses and network access for other agencies would be through their campuses, the control of what would be carried over the network would not be tightly controlled by the centralized authority (the Regents) or by the host campus.

Determination of quality emerged as a subset of this theme as well. Although there were members who recognized the need for some external oversight, there was a consensus that quality of programs should be an

institutional responsibility, and that it should reside with the faculty.

Another institutional issue that was identified was needs assessment. With strong feelings about institutions' responsiveness to communities, there was no interest in having needs determined by a state agency. One member defended his institution's service area and the "rights of institutions to determine appropriate services." Institutional autonomy in some respects is still connected to an institutional mission and identity that is defined by geography.

The Electronic Media Policy has also placed greater institutional responsibility in establishing inter-institutional relationships. Collaborations between institutions are the responsibility of the individual campuses. In discussing a partnership involving brokering of educational services, one member frankly said "Who comes in is a local decision."

Movement to New Collaborative Relationships

It is in this movement where perhaps the most powerful statements and concerned voices are found, some raising concerns that reflect discomfort and uncertainty,

and others that see an enormous potential. It suggests that the independence found in institutional autonomy previously discussed may quickly evolve into an interdependence among institutions. This movement indicates a transition from old (current) ways of thinking to new (needed) ways of thinking. Whereas the three movements previously described appear to be clearly underway, it is this movement that is only beginning to develop in its first very small steps.

The overriding concern of many of the institutional leaders is one of self-preservation, expressed in concerns for numbers of students, which translates into financial resources from the state. Without numbers and the accompanying dollars, institutions will not easily survive. Under the current formulas for resource allocation, such concerns are unavoidable. In the words of one participant in discussing these issues, "I still see in our communications and discussions, the concern that overrides everything else, that if we do this, they will get all our students and that will affect our funding." As a result, fear and suspicion surfaced in many of the conversations and discussions.

Fear expressed itself in several ways. The smaller institutions fear that the large comprehensive universities will have a competitive advantage due to their size. There was also a fear of those institutions (regardless of size) with more experience and technological capabilities in delivering services electronically. One COI member used the term "squatter's rights" when talking about institutions that had already been doing distance learning programs. There were also fears expressed for institutions who were viewed as aggressive, innovative, and "out of control."

Many of those expressing the "current thinking" voiced concerns that indicated significant suspicions directed at other individuals, institutions, and agencies. Frequently there were expressions questioning motives and philosophy, suggesting greed as a primary consideration, decrying unilateral behavior, and raising concerns for quality of programs.

Institutional motives in the delivery of distance learning programs were questioned. A number of participants spoke about the importance of meeting "real" needs rather than offering duplicative programs or courses. Some institutions or agencies were described as

"self-serving." Some were judged to be providing programs that were "not always in the best interests of the people they serve." According to one member, a part of the problem is related to the involvement of "immigrants" within the system who do not share the historical relationships and common philosophy. Another said that under the current system institutions "can be as good or as bad as they want to be."

Greed was the most common motivation cited, and relates to the earlier discussion of numbers and the importance of student enrollments. A number of participants expressed this concern, including fears that some would do "anything for a buck" or that they were more focused on "the cash register than anything else." A part of the comments on greed were associated with discussions on the host/provider relationship in distance learning programs. "Bidding wars" were a concern, and a number spoke about serving "our students" versus "their students." Several used the term "whores" in describing certain institutional practices.

Unilateral behavior by individual institutions within the system was viewed as uncooperative and ignored others in the system. Institutions behaving in that way

were promoting "divisiveness, antagonism, and chaos." Such behavior led to calls for increased control by the Regents. The Regents need to take a more active role in arguing "the bounds of propriety," defining and identifying "bad behavior," and policing the system. Enforcement and exacting compliance by being "arbitrary" were actions that were advocated.

Quality issues again emerged in these discussions, in the context of questionable quality of programs offered by institutions concerned with "stealing students" and offering distance education programs as a "cash cow." The "awful-est mess of non-quality junk" and "crap" were some of the strongest terms used to describe the questionable quality of some programs. One member observed that the actions of a few "entrepreneurial" institutions could "taint" all electronic media offerings and impede further implementation by damaging the credibility of all programs.

Although at times there seemed to be an overwhelming majority of participants expressing the "old" view, there were others who were advocating a more positive and proactive approach. Even among the most vocal of those expressing suspicion and fear, there were at other times

statements that indicated a different, opposing view. One COI member spoke of the need "to move beyond current thinking," and others talked about avoiding short-sighted thinking or reliance on "old models."

The importance of trust and relationships emerged as a critical need in order for progress to be made. Trust in the ethics, "integrity of the people," and the institution was promoted. "Good faith" efforts were often mentioned, in particular their importance regardless of policy considerations. One member summarized the thought by saying "We can either be ladies and gentlemen or kiss it goodbye." Another COI member expressed it by asking a counterpart "Do you remember when I said this would cease being fun when we stopped being friends and started being competitive? I think we're there."

The need for collaboration and cooperation among institutions was expressed often in the "new" thinking, characterized by the sharing of resources, faculty, programs, and students. Such sharing of resources is "the real power of electronic delivery" according to one member. Cooperative use of facilities and use of electronic media as a shared resource were also mentioned

as applicable to this approach. According to one participant, such collaboration could also mean "letting others invade your territory."

Partnerships and working together were also emphasized as being important. Competition will force cooperation, leading to fewer institutions remaining as isolated entities. Also advocated were partnerships with non-higher education organizations, including vocational-technical schools and business and industry.

Consensus and communication are also important among those expressing this new thinking. Although there is a diversity of backgrounds, experiences, and philosophy that makes reaching consensus difficult, it does not diminish its import. Open communication among the institutions is critical, and a number of members pointed to the obligations of institutions to communicate with each other. Quality again was a topic within this discussion, with the observation that quality is less an issue in cooperative efforts that share resources and jointly develop programs.

As a complement to cooperation, coordination also emerged within this theme. There was a wide agreement on the importance of working as a system. A high degree of

collaboration is necessary in order for the system to reach its full potential, according to one member. System-thinking (as opposed to institution-centered thinking) is also seen to be essential, with the system viewed as a means for solving problems and creating new opportunities for students.

The role of the Regents was also emphasized. One member claimed that "there is no greater challenge" to the coordinating role of the Regents than in the realm of electronic delivery. The Regents have responsibility for providing leadership and vision during this uncertain period, and also have a significant role in building consensus and minimizing conflict. The importance of keeping support and agreement during this time was voiced by one COI member, who pointed out that failure to do so would lead some institutions into becoming "frightened obstacles."

There was also a sense of the need for positive action in order to make progress, with the focus too often being on the negative. Taking action in this way also means making a decision "as best as we can" and proceeding from there. "We can't jump from where we are to where we want to go," said one member, "so there's

going to be a period during which we tinker, modify." There is a recognition that it is not possible to wait until all questions are answered before taking action. What should guide such decisions is a "higher good" for serving "more students, better" through a "decent spirit of cooperation."

Summary

This chapter has presented the salient themes that emerged from the collection and analysis of the data. There were four themes or movements that were identified, with a single theme overarching each of the movements. Evident in each of the four themes or movements was a sense of impermanence and transition. The four themes identified were a movement to distance education, a movement to open market competition, a movement to institutional independence, and a movement to new collaborative relationships. The first three of these movements seem to be well underway or in progress. The last one appears to be a movement that in the minds of many needs to occur, and may only be in the very early stages of its commencement.

VI. SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Summary

Distance education and the use of new technologies has been presented as a possible approach that can be used to expand access and improve the quality of higher education. In many respects, its promise has been unfulfilled. Given that state higher education policies influence the utilization of any new models of educational delivery, including distance education or instructional technology, how such policies are developed is an area of interest.

This study employed a single case study research design using qualitative data. The purpose of the study was to examine distance education policy formation and the values and issues that influence the key participants in the process. To accomplish the purpose, an analysis of the policy formation process in a state system of higher education was undertaken. More specifically, the process of developing and revising a state policy for distance education was examined.

A review of the literature in three areas preceded the study. Theories in organizational behavior were

studied, including the works of Likert, Etzioni, and March and Simon. Higher education policy literature was also examined, drawing on the works of Baldrige, Birnbaum, Greer, Halstead, and others. The body of literature related to distance education policy was subdivided into two sections. The first area related to state higher education goals and distance education. The second broad area was more expansive and addressed the two related issues of conflict and collaboration in distance education.

The single case study design was used and interviews, document analysis, and participant observation were employed. The development of the Electronic Media Policy of the Oklahoma State System of Higher Education was the case under study. As the data were collected and analyzed, emergent themes were identified.

Conclusions

The research questions formulated to guide the study were:

1. How do the values held by the key participants in the policy formation process guide them in defining policy problems and developing policy?
2. How have the goals that have guided distance education policy decisions corresponded with the traditional state goals of higher education and the values of the policy actors?
3. What have been the methods of decision-making and how has their relative success or failure been assessed?

After review of the literature and collection and analysis of the data, the research questions presented in Chapter I may be addressed. Additionally, other salient findings emerged from the data that went beyond the initial questions.

Findings

The findings for each of the research questions are presented below.

Values of Participants. Analysis of the data yielded a clear picture of the role of the participants' values in the policy formation process. Whether collected from interviews, observation during committee

or council meetings, minutes of meetings, or other documents, participants were very clear and vocal about where they stand on the relevant issues.

Institutional leaders exhibited a range of positions that were reflective of their beliefs and values. Some were rather traditional in their views of the role of distance education within the higher education environment. There was a view that seemed more concerned with the negative impact on their campuses and their existing academic programs. There was some support for distance learning, and its potential was recognized as a possible positive result. Support was mild, though, when compared to the fear and concern that usually accompanied it. For every view of the positive potential there were more often three viewpoints that demonstrated significant concerns for quality and questionable practices. Although the expanded use of distance learning and other instructional technologies was recognized as an inevitability, a rather suspicious reluctance seemed to be the stronger guiding force.

There were, though, those who instead focused on the opportunities that the technologies were presenting. Their attitudes were shown to be generally more

optimistic in their assessment of the impact of learning technologies on higher education. In many cases, their views were reinforced by real-life examples of how the technologies had had a positive influence on their own work or teaching. That is not to say that there was not some recognition of the problems or challenges. Instead, it seemed that there was a willingness to move forward (from their perspective) even though some issues remained unresolved. The potential gains exceeded the possible negative effects.

In both cases (traditionalists and progressives) institutional perspectives were evident. In very few instances were the broad state-level policy goals very explicit. It is not surprising that the State Regents most often reflected such thinking, and that the institutional representatives were more concerned with how the issues would be affecting their own organizations. There were a few instances where a COI member might begin to consider the "big picture" of a state-level perspective, but even in those few cases the issue seemed to be couched in terms of the state system and its influence on the individual campus. State Regents' staff were most often in the middle ground,

maintaining the dual roles of institutional advocates and instruments of the state system. The complications that arose in resolving institutional goals within state goals is consistent with Millard's (1980) analysis of state higher education systems. In some cases institutional perspectives of institutional level decisions and state level decisions were at variance both between institutions and between institutions and the coordinating board. Issues where such complications arose included determination of need, assessment of quality, and institutional mission. Millard also discussed the difficulties of statewide planning due to increasing uncertainties. The uncertainties were evident in this case, related to the changing technologies, increased distance education programs, and the changing nature of the higher education environment. All these factors have clearly made statewide planning and policymaking more difficult.

State Goals and Distance Education. The broad state goals such as access, equity, and quality were found to be congruent with distance education goals as presented by the participants. There was greater attention to some more than others.

While access is generally thought of as one of the primary goals of distance education, discussions of access did not dominate. It could be that it is such a widely accepted goal that little needs to be said. Access issues were not ignored by any means. Oklahoma's populist history has most likely led to the numbers of institutions in the state and their close proximity to the majority of citizens. For many the access issue has been addressed by the campuses that have been established over time, and distance education is considered to be a means for furthering a goal that has already been reached.

Quality as a state goal, or high quality educational programs for the state's citizens, was the most evident and was a shared concern among all participants. Quality in distance education, however, was seldom defined in any particular way, and most often drew comparisons to a traditional classroom or campus experience. Those factors that indicated quality on the campus were also the benchmarks for determining quality in a distance learning environment. Faculty and accreditors have the principle responsibility in quality assurance in

traditional higher education delivery, and they may be expected to do the same in electronic delivery.

Equity issues were indicated in two forms. Some saw the need for equity in the opportunity for students to participate in distance education programs. Geographic service areas were barriers that must be removed, giving students more choice in their higher education experiences.

More often, equity was expressed in terms of institutional equity. Some institutions were considered disadvantaged by limited technical capabilities, and there needed to be some provisions to "level the playing field." Additionally, equity was promoted to help ensure that institutions were afforded equitable opportunities to serve certain areas, whether the areas were geographic or programmatic. That is, all should have an opportunity to serve a particular place, or to serve a particular program niche. Exclusive franchises (such as in designating a single provider in a certain subject area like business or history) run counter to this concept of equity. Exclusive franchises also run counter to the concept of open market competition.

Effectiveness of Decision-making. The policy formation process that is the focus of this study is built very much on consensus-building and participation. It is reflective of the concepts of cohesion (Etzioni, 1961) and consensus (Ouchi, 1981) found within the organizational literature. Cohesion allows cooperative interaction without the necessity for complete goal consensus. Although institutional representatives' positions would differ on certain topics like service areas or quality assurance, there seemed to be a willingness to cooperate in the policy formation process.

Ouchi (1981) determined that progress in formulating or revising policy is more likely to occur when the participants experienced a positive expressive relationship (cohesion) or shared trust and consensus. Based on the interactions among the institutional representatives and other indications, the process examined in this study would verify those findings. Trust and adherence to an underlying set of common values appeared to be important factors, and their importance was most apparent when they were absent. Institutional interest in cooperation or collaboration was lowest when questions of trust and motivation were raised.

Effectiveness of the process is difficult to assess, in that the issues with which the policy was concerned were exceedingly complex and in a high state of change. In some respects, participants were clear in determining the inadequacy of the policy. There seemed to be an acceptance that no policy would be adequate during such times of rapid technological change. This was consistent with Zellar (1995), whose findings indicated such insufficiency of states' policies related to distance education. Existing policy structures are unable to keep pace with the changes in the areas that the policy is supposed to address. Ketchenson (1996) had similar findings. Highly centralized systems have difficulty responding quickly to change, and technological innovations are more easily adopted and shared by the entrepreneurial actions of individual colleges. This is compatible with the findings in this case. Institutions are much more flexible in implementing innovations than a system of higher education such as a state coordinating board, particularly when such changes are made through continuing education units or others that operate "in the margins."

The views of most participants could not be characterized as highly critical of the policy, though, in that there was also a clear view that no policy would likely be adequate in such uncertain times. The openness in the process, however, allowed participants to make such assessments and candidly discuss what the critical issues were. The inadequacy of the policy formation process was never an issue, unless it was expressed as a concern for the deliberate pace.

The three forces influential in the policy formation process identified by Weiss (1983) were confirmed. Information, in the form of direct knowledge, anecdotal evidence, and to a lesser extent, research, contributed to the process, with participants using various sources of information. Interests, primarily self-interests in institutional perspectives (from both "protectionist" and "aggressor" institutions), were most definitely influential. Ideology, the core values of those involved, also played a significant part.

Other Findings

As reported in the previous chapter, two themes that emerged were related to the increasingly competitive

nature of higher education in general and distance education in particular, and the increasingly interdependence between and among institutions. On the one hand, institutions are becoming more sensitive to competitive pressures and are responding accordingly. At the same time, though, there is a recognition of the critical importance of collaboration and cooperation with other institutions and organizations.

Litwak and Hylton (1969) discussed this in terms of inter-organizational coordination in higher education systems. Interdependent yet competitive units are the participants in such systems. Their analysis and description is consistent with how institutions in Oklahoma interact. The interdependence of institutions is evidenced in their willingness to cooperate and collaborate in many areas. The conflict that arises as they go about their business shows their competitiveness. Epper (1996) had similar findings in studying systems in Maine, Minnesota, and Colorado. In state higher education systems, both competition and coordination must coexist in distance education efforts. The Oklahoma system can be described in the same way.

Recommendations for Future Research

The study of higher education policy formation remains a topic in need of further examination. While such examination is needed in general, distance education policy as a subset of higher education policy also needs additional study. Distance education practice has continued to receive much greater research attention. State system policies that are concerned with distance education or other use of electronic media in higher education must receive attention as well.

The need for balance that was among the findings of this study is a possible approach that may be used in distance education policy analysis. There appears to be a critical issue in the effectiveness of policy that relates to how well the policy balances seemingly opposing philosophies or approaches. In the case of the Electronic Media Policy, there was an interest in striking the balance between system coordination and uncoordinated competition. It suggests that the most effective policies are those that provide that equilibrium.

In considering this, the application of chaos theory to the policy process may be particularly applicable.

Optimum conditions exist for systems that are described as being on the "edge of chaos," or in a state of equilibrium between the extremes of total order and total chaos (Waldrop, 1992). Analysis of policy formation and policy effectiveness could benefit by the application of chaos theory to this area.

Additionally, a deeper investigation into each of the four emergent themes could also yield valuable findings that could further advance distance education policy analysis. In particular, the theme that indicated feelings and concerns for the impermanence and uncertainty surrounding the issues involving distance education policy was overarching and seemed to be a common thread within the other themes. An analysis of how such uncertainty and chaos may affect policymakers and key participants would be of great interest. Further, an examination of how they accommodate such uncertainty within the policy formation process could be useful.

With the increasing importance of cooperation and coordination, a number of questions may also be raised related to state coordinating agencies and their effectiveness. How can coordinating boards build

consensus and cohesion among its member institutions and mitigate the negative effects of conflict created by competitive actions? What seem to be the most effective approaches in resolving conflict? March and Simon (1993) identified two organizational reactions to conflict: analytic and bargaining. Higher education would appear to more often respond with a bargaining or political approach. How might an analytical (using problem solving and persuasion) reaction be promoted? Would such an approach be more effective?

Zeller (1995) presented four models of distance education to describe state system policy. The four represented policy orientations across a continuum. The coordinating board model (with Oklahoma as an example) was characterized as a more progressive approach than the laissez-faire or consortium models. The fourth model, (the comprehensive approach), however, was shown as even more progressive on the continuum. How may state boards and agencies redefine themselves to respond to the new challenges of telecommunications-based learning and technology? What changes in procedures and policy could promote a more comprehensive system? Is an institutional focus the appropriate one for a coordinating board, or

should there be greater attention to the individual learner?

Conclusion

The process of policy formation is contextual and value-laden. The analysis of the policy formation process in the case of the Oklahoma State Regents for Higher Education Electronic Media Policy attests to that. Understanding of policy in this case is not possible without going underneath the surface of the basic document. The policy and the policy environment is not static. Instead, it has been shown to be dynamic, influenced by the myriad of key participants that include Regents and their staff, presidents, academic vice presidents, and distance education professionals. Although the uncertainties and difficulties may seem overwhelming, a key to progress and successful transition is based on just such an active policy process.

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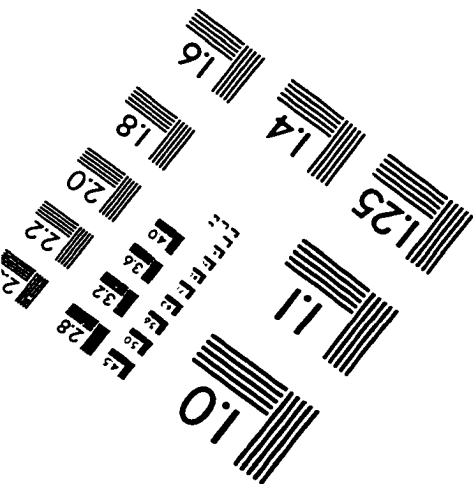
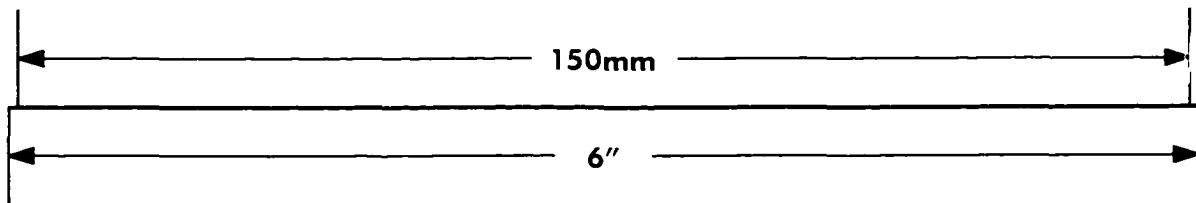
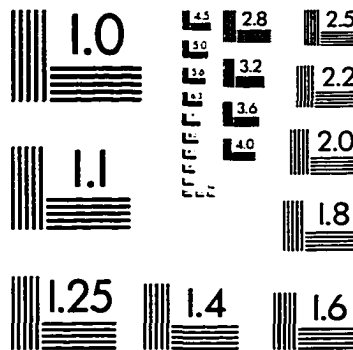
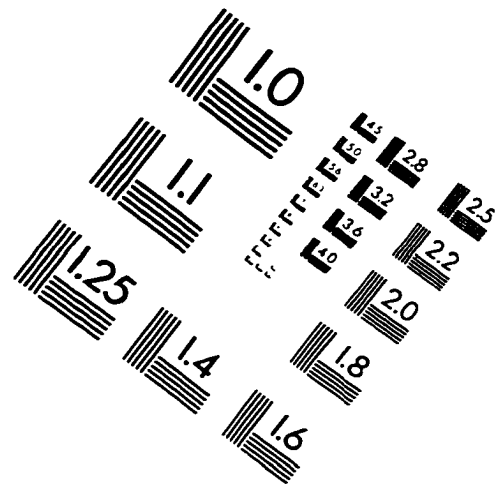
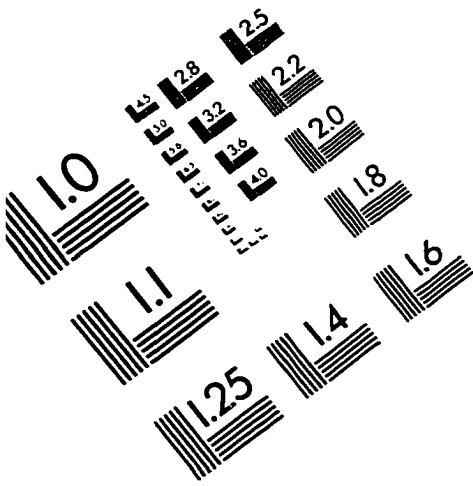
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IMAGE EVALUATION TEST TARGET (QA-3)



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