Developing a Distance Learning and Online Strategy:
A Case Study of a Small, Private University using the Hedgehog Approach

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ABSTRACT

St. Mary's University, a small, private Catholic university in San Antonio, Texas is faced with decisions surrounding online education and/or distance learning. The administration requested that a subcommittee be formed to establish strategic guidelines and recommendations for implementation. This paper presents the business case analysis upon which the committee embarked. Instrumental in the process was the Hedgehog concept as described by Jim Collins in his book, *Good to Great* and the report "Quality on the Line: Benchmarks for Success in Internet-Based Distance Education" issued in April 2000 by the Institute of Higher Education. Ultimately, the team reached a consensus and recommended DL technologies be utilized at the University but within appropriate guidelines. One major recommendation was the formation of a clear statement of the primary measures of success of the DL strategy along with appropriate benchmarks. These benchmarks include mission-related and value-related efforts.

Keywords: distance learning, online education, quality benchmarks, business analysis

1. INTRODUCTION

St. Mary's University is a small, private catholic university in San Antonio, Texas. Online and distance learning (DL) courses had been offered but on an ad hoc basis.

No particular guidelines had been established for DL course offerings, program offerings, degree plans, or other forms of online projects. Most of the courses delivered online were experimental but without stated goals or measures of success. Like many private institutions, enrollment had declined in recent years and the idea that distance learning might help retention was a major consideration. There was also the notion that without an online program, the reputation of the University might suffer, adversely impacting enrollment and retention even more.

The administration recognized the need for a more structured approach and a written strategic plan for online courses, including analysis of the viability of offering these courses. The Vice President of Academic Affairs requested a subcommittee of the University Technology Committee (UTC) be appointed to evaluate distance learning and online instruction from a strategic vantage point.

A subcommittee was formed in January 2007 with volunteers from the UTC as well as recruits from functional areas across campus, i.e., technology services and the library. Most of the subcommittee members had been involved with online and DL as a faculty member or in a supporting role. The subcommittee (herein referred to as the team) was charged with assessing DL programs within the context of the University mission and outlining a broad strategy for DL at St. Mary's. The Vice President asked the committee to particularly consider how DL might add value to the educational mission of the University while also improving enrollment and/or retention. The team utilized their collective experience, the history of the University with DL, and University documents such as a vision, mission and strategic plan to develop recommendations. The administration was open to any suggestions, including that of abandoning DL altogether. Working under this charge, the team presented its findings in a report to the University administration in May 2007.

With traditional universities, colleges, and corporate training providers moving aggressively into electronic instruction, and with the emergence of entire virtual universities, competition among online courses and programs is intense. We suspect that many other schools, like St. Mary's, are struggling with the same issues regarding distance learning. It is our hope that the following discussion will aid others in formulating and implementing a strategy to guide the consideration, planning and implementation of distance learning for their institutions.

2. THE BUSINESS CASE

The Business Case for Distance Learning was based upon Jim Collins' Hedgehog Approach as discussed in his book, *Good to Great*. The Hedgehog concept is based on the fact that the animal sees through complexity and discerns underlying patterns. "Hedgehogs see what is essential, and ignore the rest." Three intersecting circles depict the concept. These circles represent (1) What you can be the best in the world at (2) What you are deeply passionate about, and (3) What drives your economic engine.
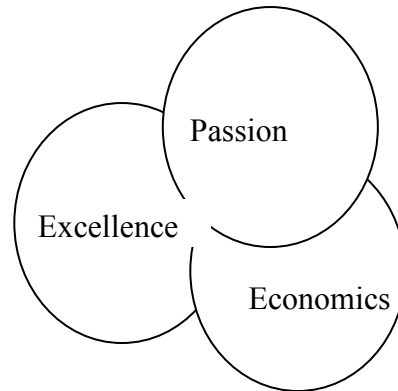
While a SWOT (strengths, weaknesses, opportunities, and threats) analysis was indirectly useful, the Hedgehog approach allowed us to focus on St. Mary's differentiating qualities. Rather than spend time determining how weaknesses could be overcome, emphasis was placed on analysis of our strengths and passions and how these qualities might be integrated with distance learning, making the University even more attractive to current and potential students.

The following three questions were considered when determining the direction of the online strategic plan:

1) Does distance learning help strengthen those areas in which St. Mary's University already excels?
2) Does distance learning support the passion of the campus members who are or will be directly or indirectly involved in distance learning?
3) Is implementation of distance learning economically feasible?

Each of these will be addressed.

Excellence

The Mission states, "St. Mary's University, as a Catholic Marianist University, fosters the formation of people in faith and educates leaders for the common good through community, integrated liberal arts and profes-

sional education, and academic excellence." St. Mary's excels at nurturing well-rounded professionals who have a strong sense of belonging to a community of faith and a strong sense of civic responsibility. It does this by offering a liberal arts core curriculum within the Catholic intellectual tradition, and by paying close attention to the needs of the individual student. Attention to the individual student comes through the small class size and frequent opportunities for students to interact with faculty and staff. These factors were paramount in the team's discussion of information technology characteristics.

Information technology (IT) is often thought to increase isolation amongst its users, a characteristic exactly opposite of the institution's goals. However, in view of evolving IT capabilities, online learning might actually enhance student interaction with peers and faculty. The Catholic intellectual tradition, in fact, encourages keeping in touch with the changes in society and technology. Employment of advanced technology for instruction can provide effective delivery for individualized instruction, bring people together in a collaborative environment, and provide a certain level of experiential learning. Thus, in general, distance learning can help strengthen core values.

The team came to the conclusion that certain steps could be taken to safeguard the guiding values of St. Mary's University.

1) Online class size should not exceed 20, unless the course is shared between two professors from different disciplines as an integrative course. Even then the class size should not exceed 30.

2) Instructors should understand that the use of DL should increase, rather than decrease, the teacher's direct involvement with each student.

3) There should be no undergraduate "online degree," permitting students to complete their entire degree without ever having set foot on campus.

4) DL courses should be available only to students who have fulfilled a significant residency requirement. Thus, only up-

per-division or elective courses should be offered in the DL format.

5) Technologies that permit students to communicate with classmates should be preferred over technologies that isolate students from all but the teacher. (Hence, synchronous technologies should be preferred over asynchronous technologies.)

6) The University should encourage the extensive use of Blackboard-like technologies for non-DL courses to ease the student's transition between DL and non-DL courses.

Passion

The team was able to identify passion throughout the campus without much difficulty. As in most university settings, there is a passion for knowledge. Faculty is passionate about learning new concepts and passing these findings onto students. The hope is that students share this same passion for knowledge! There is a strong commitment to teaching and service. However, St. Mary's University possesses additional characteristics that might be portrayed as zeal or passion. While individual faculty and staff have their own diverse obsessions, the community as a whole might be characterized by the cross-disciplinary friendships and the camaraderie that develops within complementary arenas. The small campus, and possibly the numerous committee meetings, convocations, and socials, helps build community and relationships that might not be prevalent within larger educational institutions.

The team determined that distance learning can, indeed, allow for mutual learning and interaction amongst faculty in order to advance this passion. But the choice of the technology to implement DL can hinder this goal. Some forms of technology tend to isolate both the faculty and the student. With the right technology for communication, excitement can shine through to students and extend community building through shared attitudes toward the subject matter.

Team members agreed that faculty participating in DL must see the direct connection between the method of delivery and their own passion in order for the programs or

courses to be effective. The risk of online education to the instructor may be perceived as too great if the faculty member can not envision the correlation with the technologies and the student's learning outcomes. While passion for student learning is pervasive, it is recognized that some instructors will have an adverse view of technology in and of itself. The resistance to change may prove insurmountable in these individuals despite concrete evidence of positive learning outcomes. Thus individual motivations must be evaluated when predicting success of proposed offerings.

The following recommendations were made in an effort to overcome potential faculty obstacles and resistance.

1) New DL courses should originate from the faculty alone, rather than, for instance, from a College of Distance Learning.

2) The University should encourage "hybrid courses" that combine DL with in-class components.

3) There should be full time, highly visible support staff to provide help for course development, training, assessment, and technical support for teachers who wish to engage in DL teaching.

Feasibility

The third overlapping circle of the Hedgehog approach is economic feasibility. Given that distance learning courses can enhance the strengths and build on the passions found within the university, we must wonder if investing in them is financially viable. Though the online programs need not become a profit center, it is wise to recognize direct and indirect costs and benefits in both the short term and long term. But, as with most information technology projects, determining the true costs and benefits can be a difficult task.

St. Mary's University accounting structure does not currently capture financial information surrounding its online and distance learning classes. However, a division of Technology Services is in place for support and training of faculty and staff. Students across the campus are also provided with

hardware and software support. The demands of campus technology support services have expanded over recent years as the University implemented its laptop program. Each undergraduate student is issued a laptop which is exchanged every two years for an upgrade. Funds for some of these programs were initially obtained through a grant. Accounting does not allocate these resources to individual courses, thus it is difficult to determine even a rough estimate of the profit or loss involved in the current distance learning offerings.

A few of the obvious costs were discussed by the team. These include costs of developing, maintaining, administering, and assessing proposed initiatives. Software purchases and their life cycle, support systems for faculty development, assessment, and systematic improvement, hardware purchases, and technological support for students are all costs deemed essential for an effective program. These were highlighted within our final report to university administration.

As a committee, we felt as though a DL initiative tailored to the strengths and passions of the St. Mary's community will add considerable value to the educational package we offer incoming students. Plans are necessary, however, for keeping detailed records of the impact of DL courses on retention, enrollment, and recruitment. Numerous, well-planned surveys have been proposed in order to uncover important benchmarks of success or failure.

The team made the following recommendations which directly impact the economics of DL.

1) St. Mary's University should have its own certification program that faculty must pass to teach high-tech DL courses.

2) Training for certification should be freely available to all teaching faculty, including adjuncts.

3) Release time should be granted for the development of a new DL course.

3. MEASURES OF OVERALL SUCCESS

Measures of any program's goals should be in place in order to determine effectiveness. Fortunately, the Institute for Higher Educa-

tion Policy has considered benchmarks in seven areas which are necessary for high quality Internet-based DL. The Institute's report "Quality on the Line: Benchmarks for Success in Internet-Based Distance Education," published in April 2000, provides a starting point for a system of measures of St. Mary's programs. The seven areas are:

1. Institutional Support
2. Course Development
3. Teaching or Learning
4. Course Structure
5. Student Support
6. Faculty Support
7. Evaluation and Assessment

The team suggested that these benchmarks be applied critically to DL courses at St. Mary's, keeping in mind differentiating qualities of the university. In particular, new measures could be introduced to determine mission-related and values-related efforts. These measures have the added benefit of being applicable to the traditional classroom. Measures should include the extent DL contributes to a liberal, Catholic education, personal attention to student learning, experiential and service learning, and the building of community. A clear statement of the primary measures of success of the DL strategy will also help instructors design and administer their courses. Rarely can one measure provide all the essential feedback. Therefore, the committee recommended multiple, even redundant, measures, addressing St. Mary's vision, its immediate enrollment and retention goals, enthusiasm of faculty and students for the program, and the associated benefits and costs.

4. SUBSEQUENT ACTIVITY

A few actions are underway as a result of the team's report. A survey of faculty was administered and a class project is proposed. The following discusses these initiatives in greater detail.

Survey

The beginning of the Fall 2007 semester brought with it an online faculty survey addressing technology viewpoints. DL was one of the subjects highlighted in the instrument.

Class Project

A class project to assist in the DL analysis has been proposed for the Fall 2007 undergraduate Accounting Information Systems (AIS) class. Students will be asked to determine the costs and benefits of a particular online course offering, specifically Management Information Systems. This MIS course has been taught online four times during the past 2 years by one of the team members. However, there has not been an analysis of the costs and benefits associated with the course. It has been offered more frequently than some online courses due to the positive (or at least lack of negative) student feedback. Student surveys have been inconsistently administered and have overlapped in purpose thus making course evaluation and interpretation of the feedback difficult. It is hoped that this applied project will assist AIS students improve basic accounting skills as well as enhance their understanding of information systems via interviews and exposure to IT terminology. The results may be used by the administration as a starting point for determining DL feasibility.

5. CONCLUSION

The team members agreed that distance learning can be an effective pedagogical tool for a community-oriented, student-centric university such as St. Mary's. However, the team recommended that a clear statement of the primary measures of success of the DL strategy be constructed along with appropriate benchmarks. These benchmarks include mission-related and value-related efforts. In addition, the team recommended that a committee be established to produce a budget, plan, and timeline for carrying out the suggestions in the final report.

Most team members admitted to changing viewpoints throughout the semester long discussion. Some were initially opposed to any online offerings then later saw benefits. Others were initially proponents of online programs and later became skeptical. Amazingly, the group reached a consensus on its recommendations. The dialogues surrounding DL were found to be extremely enlightening. Team members actually enjoyed being on this committee! It is hoped that the approach utilized by the St. Mary's University team of faculty and staff may aid

other institutions faced with similar decisions.

6.   REFERENCES

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