

**THE VIRTUAL ORGANIZATION: CREATING A DATABASE ON PUBLIC SECTOR  
ORGANIZATIONS AND A RELEVANT CASE STUDY FOR USE IN THE SCHOOL OF PUBLIC  
ADMINISTRATION DISTANCE EDUCATION CLASSES**

**Anthony J. Giovando**

**School of Public Administration  
University of Victoria**

**December 2003**

## TABLE OF CONTENTS

EXECUTIVE SUMMARY _____	3
INTRODUCTION _____	8
PART I – DISTANCE EDUCATION _____	12
A. Definitions of Distance Education _____	12
B. History of Distance Education _____	16
C. Theories of Distance Education _____	23
D. Distance Education Delivery Methods and Instructional Technologies _____	31
E. Instructional Technologies for the School of Public Administration _____	43
PART II – THE VIRTUAL ORGANIZATION _____	53
A. Instructional Technologies in Management and Leadership Courses: Best Practices _____	53
B. The Virtual Organization Database and SPA Courses _____	56
C. Creating the Database _____	58
PART III – THE CASE STUDY _____	63
A. Creating the Case Study _____	63
B. Merging the Ministries of Health Planning and Health Services – An Outline _____	64
PART IV – IMPLEMENTATION AND OBSERVATIONS _____	68
Observations _____	70
REFERENCES _____	71
APPENDICES	
A. Terms Mistaken For Distance Education _____	78
B. Summarized Theories of Distance Education _____	82

C. Selection Questions	100
D. ACTIONS Model	101
E. Pennsylvania State University Media Selection Matrix	102
F. Internet Research: Methodology, Summary of Findings and Recommendations	106
G. Internet Research Findings Matrices	112
H. Communications: Letter Requesting Organizational Information	118
I. Organizational Information Retrieved	120
J. Merging the Ministries of Health Planning and Health Services: A Case Study	126

## EXECUTIVE SUMMARY

The School of Public Administration (SPA), University of Victoria, is transforming itself into a graduate school that provides a complete graduate program through online distance education, while also retaining its conventional on-campus attendance format. In conjunction with the Distance Education Services, SPA is currently developing distance education courses.

Many School of Public Administration classes employ projects that require teams of students to interact with organizations in the community and conduct organizational analysis. During the curriculum planning stage for the distance education classes, it was not immediately apparent how such projects and the pedagogical value of these exercises, the team experiences, experiences gained through a hands-on approach and use of actual clients could be transferred to the distance education format. During a conversation with one of the professors, I suggested that perhaps a database for a virtual organization could be created to support SPA distance education course material. Students could learn from a virtual organization multimedia database.

It is from this suggestion that my Admn 598 project flowed. This report explores whether and how just such a database could work, contributing to the development of the materials necessary for its population, and developing an applicable case study. The report is divided into four sections that explore these issues: Part I – Distance Education, Part II – The Virtual Organization, Part III – An Applied Case Study, and Part IV – Observations and Recommendations.

Compared against other print-, audio-, visual- and computer-based instructional technologies determined through a combination of key questions and the use of the Media

Selection Matrix, the database best meets the requirements posed by course objectives of SPA's online distance management or leadership courses, learner characteristics, and technologies available to SPA. The proposed idea of using a multimedia database in a hypermedia environment for a SPA online management or leadership class is valid, corroborated by instructional technology selection processes.

Populated with organizational information, the virtual organization database is to occupy a support role for the on-line version of SPA's ADMN 507 – Managing from the Middle. It would specifically supporting learning activities: readings, cases, assessments, exercises, and simulations. At the present, it is explicitly outlined for use with, but not limited to, a major team-based project, serving as a replacement to contacting a real-world organization for organizational analysis.

Public sector organization types included in the database are two types of not-for-profits (social service agencies that provide direct service delivery and others) and three levels of government (municipal or city, provincial and federal). Aboriginal organizations were intended for the database as well, but unfortunately information was not readily available and so they were excluded from the study. Organizational information gathered for each organization and included in the database is categorized as Planning, Organization, Programs, Reports, Training, and Financial.

Data gathering was an unexpectedly protracted and frustrating process. The Internet was the proposed primary gathering tool, but it was not as bountiful as anticipated. For the most part direct contact with the organizations was necessary to acquire information. At the time of writing this report, fairly extensive information, in both hard and digital formats, has been obtained for each public sector organization type. Additional information is still

expected from some organizations. I will continue to work with Continuing Studies to complete the database.

Table 1. Organizations and information gathered or received

Organization	Category					
	Planning	Organization	Programs	Reports	Training	Financial
Not-for-Profit: Victoria Cool-Aid Society	✓	✓	✓	✓		✓
Not-for-Profit: United Way of Victoria	✓	✓	✓	✓		✓
City-Level Gov.: City of Vancouver*	✓	✓	✓	✓	✓	✓
Provincial-Level Gov.: Ministry of Health Planning	✓	✓	✓	✓	✓	✓
Provincial-Level Gov.: Ministry of Health Services	✓	✓	✓	✓	✓	✓
Federal-Level Gov.: Chief Information Officer Branch, TBS*	✓	✓	✓	✓	✓	✓
Federal-Level Gov.: Western Economic Diversification*	✓		✓	✓		✓

\*Information still to be received

A case study was created to facilitate the pedagogical application of the database and its information, utilizing the database as the backdrop for its characters, organizational dilemmas and challenges, and narrative. The case study, *Merging the Ministries of Health Planning and Health Services*, is for use with the Admn 507 online class. The student is presented a fictional narrative set in the context of the British Columbia public service in which he or she assumes a consultant role to the four-member team in charge of merging the Ministries of Health Planning and Health Services. The merger must occur during the next fiscal year and produce a savings of up to 5% from administrative expenses. The student is presented contextual information and a recap of rendezvous' with four characters

from divisions within the ministries. These characters represent four distinct and opposing managerial roles and accompanying competencies, incorporating the distinct tensions and conflicts inherent to the Competing Values Framework of the Admn 598 text: Ms. I.M. Focused (producer and director role), Ben Evolent (facilitator role), Mr. I. Can (innovator and mentor role) and Mrs. I.C. You (monitor role). The student is tasked with the challenge of providing advice and recommendations on the merging process.

There are a number of implementation issues and points that should be addressed. These issues and points fall under the themes of construction, maintenance and next steps of the database. They are:

- Include a disclaimer stating there is no guarantee of accuracy of the information and that organizations can not be held responsible for that accuracy to alleviate concerns of participating organizations.
- Pay attention to initial developmental analysis of the database. It is paramount to database user-friendliness and success.
- Address information gaps and the lack of an aboriginal organization if resources permit.
- Evaluate to determine the effectiveness of the database in providing necessary and relevant information, and the effectiveness of course exercises in utilising the database.

The School of Public Administration will distinguish itself by creating the virtual organization. The virtual organization is a more sophisticated application of technology than used by most when providing online distance education. Its use is not limited to management and leadership classes, but can extend to marketing, strategic planning and human resources classes. The database might provide the blueprints for a more advanced virtual organization. A virtual organization that could include digital video or audio of

mock interviews, or individualized or personalized employee background information or organizational information specific to thematic areas of course study.

## INTRODUCTION

Distance education first appeared nearly three centuries ago, in the form of basic shorthand courses, with the introduction of the Penny Post System. Since that time, as communications technologies have been developed, they have been adopted to deliver distance education courses to students (e.g., radio, television, computer, etc.). These developments in communications technology have provided means for educational organizations to offer classes, both synchronously and asynchronously, across the globe to unprecedented numbers of students, with both one-way and two-way communications.

In particular, the advent of the personal computer and the Internet have marked a turning point in the capacity of distance education to provide all media types (print, audio, and visual) through one delivery method. Subsequently, computers and the Internet have raised the potential for the increased pedagogical value of distance education and its ability to simulate real-world learning experiences. Furthermore, distance education possesses qualities that escape traditional attendance-based education programs. It helps to meet the changing needs of students, provides education to geographically restricted individuals or those who cannot attend on-campus classes due to other commitments, and it offers an economically advantageous method of providing education to masses in a fiscally constrained environment. More and more, educational organizations are providing distance education classes in conjunction with their conventional on-campus education.

The School of Public Administration (SPA), University of Victoria, previously provided a graduate program that requires on-campus attendance for its core courses. However, it is currently transforming itself into a graduate school that provides a complete graduate program through online distance education, while also retaining its conventional

on-campus attendance format. In conjunction with the Distance Education Services, SPA is currently developing the distance education classes.

Many School of Public Administration classes employ projects that require teams of students to interact with organizations in the community and conduct organizational analysis. During the curriculum planning stage for the distance education classes, it was not immediately apparent how such projects and the pedagogical value of these exercises, the team experiences, experiences gained through a hands-on approach and use of actual clients could be transferred to the distance education format. During a conversation with a professor, I suggested that a database for a virtual organization could be created to support SPA distance education course material. Students could learn from a virtual organization multimedia database.

This conversation led to the following Admn 598 report. This report explores whether and how just such a database could work, contributing to the development of the materials necessary for its population, and developing an applicable case study. The report is divided into four sections that explore these issues: Part I – Distance Education, Part II – The Virtual Organization, Part III – An Applied Case Study, and Part IV – Observations and Recommendations.

Part I – Distance Education introduces the reader to distance education, definitions of distance education and provides a working definition of the discipline for the purposes of this report. A number of the available theories on distance education are briefly reviewed and reader is provided with an overview of the historical development of distance education. This is followed by an examination of the four media, print-, audio-, visual and computer-based media, that are employed for the delivery of distance education, and the individual instructional technologies that fall under each media. The second half of Part I

presents a number of potential instructional technologies for use in the School of Public Administration online distance management or leadership class as determined through a combination of key questions and the use of the Media Selection Matrix. The proposal to use a multimedia database in a hypermedia environment is found to best meet the requirements posed by course objectives, learner characteristics and technologies available to the School of Public Administration.

Part II – The Virtual Organization is the nuts and bolts in the database development: defining the role of the database, the organizations and information it will house, assembling that information, and recommendations and suggestions for its future maintenance and next steps. It begins by examining the support role the virtual organization database plays for the learning activities of the on-line version of SPA's ADMN 507 – Managing from the Middle. Public sector organization types included in the database are defined: two types of not-for-profits, three levels of government, and aboriginal organizations. The organizational information to be gathered for each organization included in the database is categorized and defined. Database categories, for the most part self-explanatory, include Planning, Organization, Programs, Reports, Training and Development, and Financial. Efforts and approaches to gather organizational information and the information eventually collected for the database are summarized.

The Internet was not as bountiful as first anticipated and for the most part direct contact with the organizations was necessary to acquire information. Fairly extensive information, in both hard and digital formats, has been obtained for each public organization type, except for an aboriginal organization. In some cases, there is additional information still expected from organizations. Organizations included in the database to date are: Victoria Cool-Aid, United Way Victoria, City of Vancouver, Ministries of Health

Planning and Health Services (BC Provincial Government), Chief Information Officer Branch and Western Economic Diversification (Federal Government of Canada).

Part III An Applied Case Study, the penultimate section, presents the development of a case study to facilitate the pedagogical application of the database and its information. It is a fictional case study that utilizes the database as a backdrop upon which to base its characters, organizational dilemmas and challenges and narrative. The case study is created for Admn 507 on-line class environment, incorporating the tensions and conflicts inherent in the Competing Values Framework central to the course, and is of sufficient magnitude that it lends itself for use in a major, team-based assignment.

The case study entitled *Merging the Ministries of Health Planning and Health Services* is a fictional narrative set in the context of the British Columbia Provincial Government. The Ministries of Health Services and Health Planning are ordered to merge and reduce operating expenses by up to 5% within the next fiscal year. The student, functioning as a consultant for the merger, is asked to provide recommendations and advice to four diametrically opposed division directors from the two ministries.

The report concludes with Part IV – Implementation and Observations. The section presents recommendations on maintenance and future developments of the database: the inclusion of an accuracy and responsibility disclaimer, filling in gaps in information and organizations, measuring and ensuring the success of the database, and updating. It concludes with a few thoughts on distance education, potential uses of the database, and future integration of cases with the database.

## **PART I – DISTANCE EDUCATION**

Distance education is a relative newcomer to the field of education, only recently being accepted as a valid and research supported discipline. The key element that distinguishes distance education from conventional or traditional education is the separation of the educator and learner(s). Such separation requires the employment of technology (print-, audio-, video- or computer-based technologies) to facilitate communications between the instructor and learners and among learners, necessary to the teaching and learning processes. Furthermore, distance education includes linkage with an educational organization differentiating itself from private study (i.e., learning from reading a National Geographic, watching televised documentaries on the Discovery Channel, etc). First delivered through the postal system, early distance education classes have evolved greatly from the basic shorthand correspondence classes introduced nearly three centuries ago. A vast array of subjects are now offered through distance education, from private training courses to classes and degrees at the graduate and post-graduate levels, delivered globally via advanced synchronous two-way telecommunications technologies.

### **A. Definitions of Distance Education**

Distance education is a distinct discipline in the field of education. Traditional or conventional education and other forms of education are not to be confused with distance education. Conventional education and the provision thereof, is the normal offering of education at educational institutions today (Keegan, 1996). Its characteristic structures are dialogue, lecture, tutorial and seminar; and the laboratory practical, the field trip and use of

the library or resource centre (Keegan, 1996). Its characteristic technologies are the overhead projector, white or black board, audio-visual equipment, and, more and more, computer technologies (Keegan, 1996). Moore (1977) highlights two further criteria for traditional education – time and place. Conventional education is “applied to formal classroom-based instruction in a school, college, or university setting, where teacher and students are physically present at the same time at the same place” (p.22).

There exist other forms of education that are not conventional and which are erroneously assumed to be synonymous with distance education. These forms include non-traditional education, open education, virtual education, flexible learning, correspondence education, home study, independent study, external studies, distance teaching and distance learning (for brief summaries of each refer to Appendix A: Terms Mistaken For Distance Education.). These forms of education do not possess various key elements of distance education in one manner or another.

Early and modern definitions of distance education demonstrate the evolution of distance education and its continuing maturity as researchers and practitioners strive for more precise definitions reflective of the beliefs, practices and technologies of the day. The following does not represent an exhaustive list of distance education definitions. Instead it provides examples, both of early and more modern definitions, which reflect paradigm shifts in the development and understanding of distance education.

In his pioneering work, Moore (1973) highlights the employment of communications technology in an educational environment characterized by the geographical separation of the teaching and learning processes. He observed that “distance teaching may be defined as the family of instructional methods in which the teaching behaviours are executed apart from the learning behaviours, including those that in a

contiguous situation would be performed in the learner's presence, so that communication between the teacher and the learner must be facilitated by print, electronic, mechanical or other devices" (p.664).

Holmberg (1977), adopting the newly-coined term 'distance education', offers a more holistic approach towards distance education; softening the dichotomy between distance learning and distance teaching adopted by many previous researchers and practitioners. He draws attention to the importance of the organization in the facilitation of distance education, by noting that it "covers the various forms of study at all levels which are not under the continuous, immediate supervision of tutors present with their students in lecture rooms or on the same premises, but which, nevertheless, benefit from the planning, guidance and tuition of a tutorial organization" (p.9).

Over 25 years later, after years of technological change Moore (1990) concisely states "distance education is all arrangements for providing instruction through print or electronic communications media to persons engaged in planned learning in a place or time different from that of the instructor or instructors" (p.xv). Portway and Lane (1994) emphasize distance education's growing reliance on more technologically advanced delivery methods.

The term 'distance education' refers to teaching and learning situations in which the instructor and the learner or learners are geographically separated, and therefore, rely on electronic devices and print materials for instructional delivery. Distance education includes distance teaching – the instructor's role in the process – and distance learning – the student's role in the process. (Portway and Lane, p.195)

The U.S. Department of Education (1995) reiterates distance education's reliance on modern technological developments and draws attention to the fact that in-person

interactions between teacher and student may periodically occur – typical of many modern-day distance education programs. ‘The application of telecommunications and electronic devices which enable students and learners to receive instruction that originates from some distant location.’ Typically, the learner may interact with the instructor or program directly, and may meet with the instructor on a periodic basis (U.S. Department of Education, 1995). King, Young, Richmond and Schrader (2001) also highlight academia’s recognition of the pedagogical value of distance education. “Distance education is formalized instructional learning where the time/geographic situation constrains learning by not affording in-person contact between the student and instructor.”

Keegan (1996) synthesizes many of the available distance education definitions and reduces their content to five key elements characterising distance education: the quasi-permanent separation of teacher and learner; an educational organization is involved in the planning and preparation of learning materials and the provision of support services; technological media is used to carry course content (e.g., use of print, audio, video or computer); two-way communication between the student and instructor that permit student-initiated communication is provided; and, there is quasi-permanent absence of the learning group, with the exception of occasional meetings. Garrison and Shale (1987), arguing that Keegan’s definition of distance education is too narrow, offer three additional criteria that are further characteristic of distance education. The majority of educational communications between and among teacher and students occur noncontiguously. There is two-way communication between and among teacher and students to facilitate and support the educational process. Technology is used to mediate the necessary two-way communication.

For the purposes of this report our working definition of distance education is to be characterized by the following: the instructor and teacher are in separate locations quasi-permanently; there is quasi-permanent separation of the learning group; it is predominately asynchronous in nature, granting greater volitional control of learning to the learner; communications are mediated in a two-way manner between the student and instructor through print and technological media (predominately through the Internet and email) to facilitate and support the educational process; and it is representative of a decentralized model of distance education, bringing classes to the students that is not solely designed and targeted for the geographically restricted student, but rather, takes into account students with other restrictions as well, among them time, social commitments, family obligations, and learning preferences.

### **B. The History of Distance Education**

Over the past three centuries there has “been remarkable change in the quality, quantity, the status and the influence of distance education provision” (Keegan, 1996, p.4). Between 1728 to 1970 distance education was commonly known as ‘correspondence study’ or ‘home study’ or ‘external studies’; a system of education that was generally looked down upon by conventional educational institutions (Keegan, 1996). By the 1990’s distance education had become a valued component of many educational systems, competently delivering accredited education to very large masses of students at any given time (Keegan, 1996). Increased acceptance of and belief in the educational value of distance education has led to its continued adoption and incorporation into the curricula and programs of educational

institutes throughout the world (Keegan, 1996). Distance education now plays a new role and a crucial one at that, complementing schools, colleges and universities in many national education systems.

*The Early Years: 1728 to 1957*

Distance education, as argued by some in the field, began in the forms of cave painting, St. Paul's letters to the Corinthians, or tribal talking drums (Mood, 1995). However, most distance education practitioners agree that distance education was not truly borne until the introduction of correspondence education. Necessary to correspondence education was a combination of a written alphabet and a reliable postal service to carry lessons, answers and correspondence between students and teachers (Mood, 1995; Verduin and Clark, 1991). Correspondence education was first publicly announced nearly three centuries ago.

On March 20, 1728, an advertisement for shorthand lessons appeared in the *Boston Gazette* (Battenberg, 1971; Mood, 1995). Caleb Phillips offered to mail students weekly lesson plans. Another early example from 1833 includes a Swedish newspaper advertisement offering postal tuition in composition (Bratt, 1977). Neither of the advertisements mentioned two-way communication or grading.

The first modern distance educator is generally recognized to be Isaac Pitman (Verduin and Clark, 1991). In 1840, Pitman offered shorthand courses by correspondence in Bath, England. Students copied bible passages in shorthand and returned them to Pitman for grading, using the new Penny Post System (Dinsdale, 1953). Eventually Pitman had a staff to grade the work of his students.

Private correspondence colleges were founded in the 1880's. Skerry's College prepared students for civil service examinations (Mood, 1995). University Correspondence College offered examination preparation for post-secondary degrees (Curzon, 1977). The Foulkes Lynch Correspondence Tuition Service offered accounting courses (Mood, 1995). During the mid-nineteenth century, Oxford and Cambridge developed extension services that included both lectures at various sites and "a system of correspondence instruction" (Mood, 1995, p.2).

In 1856, Charles Toussaint and Gustav Langenscheidt founded a modern language correspondence school in Berlin, Germany (Verduin and Clark, 1991). Instructional material is still published under Langenscheidt's name. In 1894, Rustinches Fernlehrinstitut was established to prepare students for university entrance examinations (Noffsinger, 1926). In 1898, in Sweden, H.S. Hermod founded his "namesake institution", now the Hermods-NKI Skolan (Verduin and Clark, 1991, p.16).

University distance education appeared in the United States in 1874. At the Illinois Wesleyan University, both graduate and undergraduate degrees could be pursued *in absentia* (Rumble, 1986). It was later discontinued in 1910. In 1883, in Ithaca, New York, the Correspondence University was founded (Verduin and Clark, 1991). It was eventually discontinued as well.

Formal distance education appeared even earlier when Anna Eliot Ticknor began the Society to Encourage Studies at Home in 1873 (Mood, 1995; Verduin and Clark, 1991; Public Broadcasting Service). Based in Boston, Massachusetts, the Society offered a program of instruction that included 24 subjects organized within six departments: art, French, German, history, literature, and science (Mood, 1995). Instruction was open to both men and women, and even then, assisted in the learning of those who could not leave

their physical surroundings. Spanning a 24-year period, 10,000 students studied with the Society (Public Broadcasting Service). The exchange of comments along with grades was originated by Ticknor, the ‘mother of American correspondence study’ (Aggasiz, 1971).

Thomas Foster began teaching mining methods and safety through pamphlets sent via mail in 1891, and organising staff to grade assignments (Mood, 1995; Verduin and Clark, 1991). With the addition of more training courses for miners, railroad workers and ironworkers, the International Correspondence School (ICS) of Scranton, Pennsylvania, was founded. By 1923, ICS had enrolled over 2.5 million students (Public Broadcasting Service). In 1878, John Vincent created an adult home reading circle (Verduin and Clark, 1991). Vincent became one of the founders of the Chautauqua movement.

The Chautauqua movement, along with the lyceum movement (Mood, 1995), were education societies “based on the idea of expanding access to education to all Americans” (Verduin and Clark, 1991, p.16). Both had lecturers that travelled to various sites; lectures were accompanied by a correspondence component (Mood, 1995). The Chautauqua movement offered four-year certificate programs through reading and correspondence instruction (p.2). Students would study through the summer and then continue through the winter via correspondence (Public Broadcasting Service). The Chautauqua movement has earned recognition as ‘the first significant distance education effort in America’ (Moore, 1989, p.223). However, it eventually lost momentum due to lack of resources and universities took over the “correspondence-for-credit arrangement” (Mood, 1995, p.2).

Many universities offered education through correspondence, but it was the University of Chicago under William Rainey Harper that “solidified and developed it” (Mood, 1995, p.2). After having started a correspondence study program for his summer residential school students through the Chautauqua educators, Harper went on to head the

College of Liberal Arts where distance study techniques were emphasized (Verduin and Clark, 1991). In 1892, as first president of the newly established University of Chicago, Harper, “the father of modern correspondence education”, created a department of correspondence study (Mood, 1995, p.2). The department was successful; 125 instructors taught 350 classes to nearly 3,000 students (Schlosser and Simonson, 2002).

Other education institutions began to take an interest in correspondence methods. In 1901 the Moody Bible Institute formed a correspondence department that is still in existence. It has provided distance education to over 1 million students worldwide (Schlosser and Simonson, 2002). Correspondence for elementary schooling in the United States began in 1906 at the Calvert School of Baltimore, Maryland (Hart, 1947). It spread to secondary-level education by the ‘20’s (Public Broadcasting Service). In the early 1920’s, the first educational radio licences were granted in the US (Public Broadcasting Service). By 1928, the British Broadcasting Corporation began using radio for adult education (Mood, 1995). It was not formal study, nor were credits or degrees granted, rather it was viewed as a means for individuals to increase their knowledge.

Television was employed for educational purposes early in its history. The University of Iowa’s W9XK originated educational broadcasting between 1932 and 1937 (Koenig and Hill, 1967). But it was not until 1951, at Western Reserve University, that college credit courses were offered via television for the first time (Schlosser and Simonson, 2002). In 1957 New York University offered televised series of college courses, Sunrise Semester, on CBS that continued for 25 years (Mood, 1995). It would not be until the 1980’s, after satellite technology was made cost-effective, that the world saw a greater degree of instructional television take-up (Schlosser and Simonson, 2002).

*Modern Distance Education: 1958 until Today*

After 1960, distance education, in particular correspondence education, spread globally. Since that time, distance education has evolved to such a degree that it is no longer just a means to receive an extra credit or class but one can now complete entire degrees and programs. It is not only offered through traditional educational institutions that require on-campus attendance, but also through public and private educational institutions that embrace distance education as an exclusive means of delivery method. Distance education delivery now ranges from traditional correspondence courses to advanced synchronous technologies.

In 1962 the first distance education university was established at the University of South Africa (Schlosser and Simonson, 2002). In the United Kingdom one year later, the University of Air was proposed. A Royal Charter was granted for the Open University of the United Kingdom, and in 1971 it began teaching (Mood, 1995). The Open University, a fully autonomous, degree-granting institution, became a worldwide model for distance education programs (Keegan and Rumble, 1982). The Open University system utilizes television courses developed by specialists along with textbooks, guides, and other resources to impart classes. Courses from the Open University were offered in the United States at the University of Houston, the University of Maryland and Rutgers University via text and video tape combined with weekly tutorials (Hartnett et al., 1974).

Computers, as a tool for delivering education, were implemented and experimented with in the late 1970's and early 1980's. In the mid 1980's the first online undergraduate courses were offered (Public Broadcasting Service). It was not, however, until the early 1990's and the advent of the high-power personal computer, broadband communications

and digital video that growth in telecommunications-based education began (Minoli, 1996). “Most distance classes today are delivered either through interactive video or over the Internet” (Palloff and Pratt, 2001, p.5).

Since the birth of the Open University, the number of open universities has continued to grow and educational institutions in pursuit of and promotion of distance education have experienced even greater growth. Recently, the California Virtual University, “a consortium of nearly 100 California colleges and universities, opened with over 1500 online courses” (Public Broadcasting Service). The drivers of this growth include: the need to increase the offering of university education; recognition of the changing nature of students; and, the recognition of distance education as a cost-efficient and accessible means of providing education (Holmberg, 1986).

Within the past forty years, distance education has experienced perhaps more change than at any other time in its history. Open Universities were founded. There has been increased “sophistication of information technologies, such as CD-ROMs, interactive television, video conferencing, groupware and wireless communication” (Cachidi, 2002, p.xii), and improvements in the communications field such as the Internet. Advances and developments in “audio-, video- and computer-based learning, new sophistication in the design of print-based materials and better support systems for the student learning at distance” (Sewart, Keegan & Holmberg, 1983, p.ix) have increased the potential for greater educational content of distance education courses. Distance education is now able to reach students at far greater distances and speeds, with greater flexibility and quality than ever before. Technology has created and will continue to create “far-reaching changes in approaches to teaching, research, service and administration” (Carichidi, 2002, p.xii).

Distance education has become a valued component of many educational systems; competently delivering accredited education to very large masses of students at any given time. It now plays a new role and a crucial one at that, complementing schools, colleges and universities in many national education systems. The lines between distance education and conventional education are becoming blurred, as each learns from the other and becomes more and more similar (Ortner and Graff, 1993). The face of distance education has been reshaped numerous times over the past three hundred years while capitalising on technological advancement. New champions in the field have emerged: Michael Moore, Desmond Keegan, Börje Homberg, among others. It is now delivered globally and accessed at unprecedented levels. Yet, one key motivation remains the same: providing education to individuals who could not gain access to it. Distance education liberates one from the constraints of time and distance.

### **C. Theories of Distance Education**

Since its inception and continuing well into the 1970's there was little established theory in the field of distance education. Wedemeyer (1974) noted that: "[It] is unfortunately true that the failure of correspondence study to develop a theory related to the mainstream of educational thought and practice has seriously handicapped the development and recognition of this field" (p.3). Keegan echoes Wedemeyer's concerns ten years later when he writes that the "lack of accepted theory has weakened distance education: there has been a lack of identity, a sense of belonging to the periphery and the lack of a touchstone against which decisions on methods, media, on financing, on student support, when they have to be made, can be made with confidence" (Sewart, Keegan and Holmberg, 1983, p.63).

By the 1990s, “[n]ascent, if fragile theoretical proposals have been found in the writings of Moore, Peters, and Holmberg; ideas of value have been contributed by Delling, Wedemeyer, Bååth, Daniel , Smith, and Sewart” (Keegan, 1996, p.56). Keegan, classifies distance education theories into three groups:

- *Theories of autonomy and independence*, developed in the late 1960’s and 1970’s by Rudolf Delling (Germany), Charles Wedemeyer (USA), and Michael Moore (USA).
- *Theory of industrialisation*, from Otto Peters (Germany) in the 1960’s and 1970’s.
- *Theories of interaction and communication*, found in contemporary works from Börje Holmberg (Sweden/Germany), John Bååth (Sweden), David Sewart (UK), Kecein Smith (Australia) and John Daniel (Canada/UK).

A number of other contemporary theories exist that do not fit into Keegan’s taxonomy.

Malcolm Knowles theorizes on adult learning in his *Andragogy Theory*. Hilary Perraton’s *A Theory for Distance Education* synthesizes existing theories of distance education and communication and diffusion to explain distance education. The *Equivalency Theory*, an emerging American theory of distance education contributed to by Michael Simonson, D. Shale and Desmond Keegan focuses on the concepts of equivalency and learning experience. Desmond Keegan creates his own conceptual framework in *Theoretical Framework for Distance Education*

For the purpose of this report a brief synthesis of one or more theories representing Keegan’s classifications and one theory that falls outside, will be provided, (for descriptive summaries of each of the following theories refer to Appendix B: Summarized Theories of

Distance Education). For theories on autonomy and independence Charles Wedemeyer's *Theory of Independent Study* and Michael Moore's *On a Theory of Independent Study* are reviewed. Otto Peter's *Theory of Industrialisation of Teaching* is included. Representing theories of interaction and communication, Börje Holmberg's *Guided Didactic Conversation in Distance Education* is discussed. Last, and outside Keegan's classification, Hilary Perraton's *A Theory for Distance Education* is examined.

### *Theories of Autonomy and Independence*

Theories of autonomy and independence place emphasis on the physical separation of the teacher and student, and the independence or autonomy of the learner. Other elements often included in these theories are written communication, individualized learning, flexibility, self-responsibility for learning and active learning (Simonson, Smaldino, & Albright, 2002).

The use of 'independent study' in Charles Wedemeyer's (1981) *Theory on Independent Study* to describe post-secondary level distance education reflects the essential component of the independence of the learner in his theory on distance education.

Critiquing conventional education, both at the primary/secondary and post-secondary levels, for not taking advantage of modern technologies and employing antiquated learning and teaching concepts, Wedemeyer sets out a conceptual framework of ten elements that lead to an improved education system; emphasising learner independence and adoption of technology.

Wedemeyer believes that separating the acts of teaching and learning can overcome the 'space-time barriers' of education. He suggests six characteristics of distance or

independent systems that are capable of functioning any place there are students, regardless of the physical presence of teachers at the same point in time (Wedemeyer, 1973).

According to Wedemeyer there exist four common elements of every teaching-learning situation: a teacher, a learner or learners, a communications system or mode, and something to be taught or learned. A reorganization of these elements will accommodate physical space and allow for greater learner freedom achieving a teaching-learning system that would work any place, anytime, and for one or more learners. Ultimate responsibility for success in distance education lay on the shoulders of the instructor and the relationship developed between teacher and student.

Both Wedemeyer and Moore (1977) focus on the individualized aspect of distance education. However, where Wedemeyer's theory presents the characteristics and means necessary for increased learner independence and a successful distance education system, Moore's *On a Theory of Independent Study* focuses on the classification of distance education programs by two variables: the distance between instructor and student, and the the degree of learner autonomy.

The first variable distance, can lead to misunderstandings between instructor and learner. Distance is sub-defined by two quantifiable variables: "individualisation" and "dialogue" (p.76). Individualisation is the extent to which a learner has control over the speed at which the information is received and compelled to respond (i.e., the structure). Some programs are highly structured some are not. Dialogue is the provision of two-way communication and the extent to which the media makes it possible or impossible to interact with the instructor. The degree of two-way communications offered by programs varies among programs.

Distance and autonomy are directly related. The higher the degree of separation between instructor and student, the greater the degree of autonomy/responsibility required. In conventional education students are passive and teachers active, while in distance education students are more active and must assume a higher degree of responsibility for the learning process. “Autonomy [the second variable] is the extent to which the learner in an educational programme is able to determine the selection of objectives, resources and procedures, and the evaluation design” (p.82). Distance education programs are classified as either “autonomous” (learner determined) or “non-autonomous” (teacher determined) (p.87). The categorisation of distance education programs using the variables of distance and autonomy is applied without value (Keegan, 1996). It is simply a means for classification and can provide direction on how the program functions.

### *Theory of Industrialisation of Teaching*

Otto Peters’ (1988) theory on distance education, *Theory of Industrialisation of Teaching*, takes a very different approach than those of Wedemeyer and Moore. While Wedemeyer and Moore emphasize the individual aspects of distance education, Peters adopts a systems perspective based upon economic and industrial theory. Peters perceives distance education to be an industrialized form of teaching, comparing it to the industrialized production of goods, and it is a product of an industrialized society; indirectly asserting that conventional education (i.e., teacher lectures students in a group setting) is actually a pre-industrialized form of education.

Peters uses 14 variables to compare distance education to the industrialized production of goods: rationalisation, division of labour, mechanisation, assembly line, mass

production, preparatory work, planning, organization, scientific control methods, formalisation, standardisation, change of function, objectification, concentration and centralisation. Peters concludes that distance teaching is generally determined by the principles of industrialisation, and that increasing mechanisation and automation is gradually re-structuring the teaching process. Peters offers a final caveat: it is disadvantageous if society does not recognize the developments offered by his theory, as these structural changes in teaching merit the attention of all. If they are not aware of these changes and society lags behind the evolving “technological and industrial opportunities” it is likely that malfunctions will occur in academic teaching (Peters, 1988, p.111).

#### *Theories of Communication and Interaction*

The relationship between student and teacher and communication between student and teacher and among students are described in theories of communication and interaction. These theories consider personal relationships and communications necessary to fostering student motivation and meaningful learning. Learning is considered an individual activity that must be supported by non-contiguous communication (Simonson, Smaldino, & Albright, 2002).

Börje Holmberg’s (1983) *Guided Didactic Conversation in Distance Education* is essentially communication theory applied to distance education. It is based upon the communication that occurs between “*educans*” and “*educandus*” and peer group interaction (p.114). He explains that elaborative text processing (i.e., the interaction of the text one reads with one’s prior knowledge), and ‘internalized conversation’ (i.e., the act of internally mulling over something) represent a useful learning strategy that can be extended and

applied to teaching strategy (p.114). Students' attitudes and achievements can be positively influenced through a "guided didactic conversation", essentially inducing students to apply "an appropriate amount of text elaboration to their learning" (pp.114-15).

Holmberg's theory "implies that the character of good distance education resembles that of a guided conversation aiming at learning and the presence of the typical traits of such a conversation facilitates learning" (p.115). Didactic conversation is formed by the presentation of learning matter, be it printed or in other form, and the two-way communication provoked by assignments. Guided didactic conversation embodies six characteristics. Distance learning materials and classes that are properly prepared would be "attractive to students, support study motivation and facilitate learning" (p.117).

#### *A Theory for Distance Education*

Hilary Perraton's (1983) *A Theory for Distance Education* is a unique, stand-alone theory based on existing philosophies of education, and theories of communication or diffusion. In some ways similar to Wedemeyer, Perraton feels that education is a form of power to which all are entitled and she believes that access to education should be expanded and made increasingly available. Her humanitarian sentiments on education are reflected in the three themes of her theory: expanding education, dialogues and method. These statements and hypotheses demonstrate distance education's capacity to meet the challenges of expanding education; and, in some cases more aptly so than conventional education.

*Theories in Perspective*

It is evident upon reviewing a number of theories on distance education, that distance education has yet to be entirely explained and understood. There is no clear-cut theory. Theories are as diverse as they are recent; those reviewed range from the applied concepts of independence and autonomy of the learner, to communication theory, and to systems approaches in the context of industrialisation and economics. Distance education in many respects is still in its infancy, there remains much yet to be researched and many questions answered. As Simonson et al. (2002) note, the variety in these theories reflects the difficulties that exist in agreeing upon distance education and the means in which it should be practised. Distance education could be best termed as a dynamic discipline; its theories and practices are constantly evolving.

For the most part, the many definitions of distance education encompass a few key points. There is separation between the teacher and the student, media is used to provide two-way communications between student and teacher, and among students, and an educational organization is involved in some fashion in the imparting of education. Traditional definitions, reflecting the practice of their era, express the different time and different place aspects of the education processes in distance education. While more modern definitions include the same time but different place or same place but different time aspects made possible by the advent of modern communications technology.

Throughout its history, distance education definitions, theories and practices have been influenced by new approaches to learning, new resources and developments in communications technology, globalisation and changes in educational organizations' understanding of and responses to ever-changing student characteristics and needs. Only

time will tell how these elements further influence researchers, practitioners, learners and subscribers to distance education; and, the subsequent evolution of the theories, definitions and practices of distance education.

#### **D. Distance Education Delivery Methods and Instructional Technologies**

The term distance education explicitly implies that there is a separation, a distance, between instructor and learner. This distance requires that technologies be employed to bridge the gap and permit students and teachers to communicate. There are many types of instructional technologies available that support the delivery of distance education. These technologies can be divided into four categories: print-based, audio-based, video-based and computer-based. Recent advances in technology have blurred the lines that divide categories as new technologies often fall under more than one category.

Print, audio, video, and computer constitute the four categories of technology, and also, the distinct eras of instructional technology evolution (Bourdeau and Bates, 1997). These technologies can be asynchronous (i.e., the sender and receiver do not communicate at the same time - there is a time delay) and synchronous (i.e., the sender and receiver communicate at the same time – real time) in nature. And, they can facilitate one-way communications (i.e., there is a sender and a receiver) and two-way communications (i.e., both parties are both the sender and the receiver).

In the scope of this report the terms ‘delivery methods’, ‘delivery modes’, ‘media’, ‘educational technology’ or ‘instructional technology’ are all used interchangeably. All refer to how educational content is communicated between instructor and student.

What follows is an overview of instructional technologies with brief definitions and commentary on their advantages and disadvantages.

### *Print-based*

Print is the elemental delivery mode or “first generation of instructional technology” from which distance education first sprang to life more than a century and a half ago with the introduction of postal correspondence study (Bourdeau and Bates, 1997, p.370). Print still remains the keystone component of many distance education programs throughout the world. Print can include textbooks, course readers, study guides, workbooks, course syllabi and case studies, and can serve as the primary source of instruction or be supplemental.

Distance students may use a textbook complemented by a study guide or workbook.

There are many advantages to print materials. Print is portable. It has a high comfort level as virtually all students are used to working with it. The ease of creating and duplicating print make it cost-effective (Barron, 1999). Print is easily reviewed, referenced, edited and revised (Willis, 2003). The availability of print is immense; there already exists large selections of textbooks from which to choose (Barron, 1999). It is the ideal medium around which and through which to organize other media (Moore, 1987).

There are disadvantages to print materials as well. There is a lack of interactions (there is need of additional technologies for interactions). Print does not include audio or visual elements, and its static nature does not lend it well to teaching languages or visual concepts. If learners are illiterate or do not possess necessary language skills print is ineffective. There is a time delay in print, as much time can pass while printed material

travels between student and teacher (Barron, 1999). Furthermore, print is passive and self-directed, and without feedback and interaction instruction suffers (Willis, 2003).

### *Audio-Based*

The second generation of media, instructional audio-based technologies, began in the 1930's (Bourdeau and Bates, 1997, p370). Audio-based technologies range in complexity from asynchronous one-way technologies such as voicemail, audio-tapes and compact discs and radio to synchronous two-way technology of audio-conferencing.

*Voice mail.* Voice mail is essentially an answering machine. It permits students or teachers to leave messages, can be used to administer quizzes and can serve as an alternative to email. It is advantageous in that almost all students have access to a phone and messages can be received and accessed at all hours; however, messages are limited in time and there may be costs incurred for long distance calls (Barron, 1999).

*Audio-tapes and compact discs.* Audio-tapes and compact discs are inexpensive to produce and distribute, are easy to duplicate, reusable, versatile, and can be played almost anywhere. This form of asynchronous one-way instructional technology is second only to print in use (World Bank; Truman, 1995; Barron, 1999). As an instructional technology audio-tapes can be used to deliver lectures and panel discussions, used in conjunction with print materials, and are extremely useful with foreign languages, drama, poetry and music. Two disadvantages of audio-tapes and compact discs are that they are not interactive and they lack visual elements unless accompanied by print materials (Barron, 1999)

*Radio.* Radio, the most accessible technology in terms of cost and comprehension, has been used as an instructional technology almost since its invention (World Bank;

Takemoto, 1987). This form of synchronous one-way technology can be used to deliver lectures and panel discussions, and used in conjunction with print materials. The one-way nature of radio can be overcome by the use of telephones to phone in and establish dialogue. The difficulty lies in that radio is synchronous and requires one to tune in at a fixed time or have a stereo system that permits recording for listening at a later time.

*Audio-conferencing.* Audio-conferencing uses voice communication technologies to link participants at two or more sites, permitting synchronous two-way communication. Traditionally the telephone has been used, and, at one time, communication via the telephone was limited to just two individuals. The introduction of the speaker phone and telephone bridge have resulted in the expansion of the number of parties that can participate and the number of different sites that can be connected. Other technologies such as the Internet and ISDN are further enhancing the quality of communications experienced. Audio-conferencing is student-centred and interactive, provides easy access to experts, and is fairly cost-effective, dependable and flexible (Truman, 1995).

Overall, audio and voice technologies possess a number of advantages. They are relatively inexpensive and cost effective, easily accessible (almost everyone has a telephone and access to a tape or CD player), are easy to use, and portable (Takemoto, 1987). Certain disadvantages also exist. They may require scheduling or co-ordination when implementing synchronous technologies (e.g., audio-conferences), they lack visual information, and they may be impersonal and lack the human element.

*Video-Based*

Video-based instructional technology represents the third generation beginning around the 1950's (Bourdeau and Bates, 1997). It includes videotape and DVD; television: cable and broadcast television, Instructional Televised Fixed Service (ITFS) and telecourses; video conferencing via satellite, microwave, digital video (desktop video via the Internet), and compressed video.

*Videotapes and DVD.* These asynchronous one-way technologies are popular, easy-to-use formats for instructional materials (Barron, 1999). Most have access to a video recorder or a DVD player either at home or at school. Their use is very flexible. They are easily employed in the classroom to complement other course components or as a focus for discussion, and used for demonstrations, being particularly effective for “processes, experiments, field locations and case studies” (World Bank), or documentaries. They are also recordable – the DVD more so in the future when DVD burners become more affordable and commonplace. A disadvantage is that they are not interactive, a videocassette will eventually wear out with continued use, and both are expensive to send via the mail (Barron, 1999).

*Television.* Television, one of the more common forms of distance education delivery, has been employed for quite some time. It provides a one-way video and one-way audio connection between instructor and student. There is debate as to the effectiveness of telecourses – courses taught through television. It is argued that for many cultures, TV viewing is a passive and recreational activity, and it is therefore quite difficult for the student to adapt a more active approach to TV viewing (World Bank). While others perceive T.V. as a method of reaching the “community at large” (Barron, 1999).

Cable and broadcast television are quite costly to produce and transmit, requiring both a studio and a channel through which to broadcast. If broadcast over a public network the quality expected is similar to that of a documentary (e.g., Knowledge Network documentary) resulting in expensive production costs. ITFS is a low-cost narrowcasting system used by educational institutions to transmit over lesser distances through microwave or cable networks. It operates at a lower power, and the transmission equipment is relatively inexpensive and less complex to use. A synchronous technology, cable, digital television and access to video recorders permit students to view programs at multiple scheduled times, directly call up the program for viewing, or record programs and view them when they wish – essentially transforming the technology into “bi-synchronous” technology. Effectiveness of a telecourse will depend upon its instructional design and the support services available when the program is aired (Wiesner, 1987).

*Video technologies.* Video conferencing is a synchronous two-way video and two-way audio technology transmitted via satellite, microwave, broadcast video, digital video, or compressed video. (In its more rudimentary form it may simply be a synchronous one-way video with two-way audio.) Video conferencing can range in scale from very large fixed installations for use with “live video lecturing” (World Bank) to desktop systems complete with camera and microphone.

The use of satellite is one the oldest methods of video conferencing often providing only one-way video and two-way audio. This medium is very expensive; it requires satellite dishes, uplinks and downlinks. Therefore it is not cost-effective for schools not wishing to market their classes over a large geographical area (Barron, 1999). Microwave systems are much more cost-effective for schools; however, they are geographically limited and permit only a limited number of channels to be available in one geographical area (Barron, 1999).

Digital video conferencing requires at least two computers with a camera and a microphone. Communication occurs directly between the two (or more) computers at various sites. This medium is much less expensive than satellite or microwave, however a drawback is its relatively choppy look and feel, as images are often not transmitted at an optimum rate, nor is the connection speed adequate. Video conferencing can also be conducted over the Internet through a variety of software. Again, at least two computers with a camera and a microphone are required. Images are even choppier as the transmission rate is quite slow.

The potential of video conferencing has been enhanced by the ability to move greater volumes of information at greater speeds within and across organizations. Local Area Networks, international digital telephone switching standards networks (ISDN), coaxial cable and fibre optics offer very high speed and high quality communications media. Dial-up (i.e., the use of a telephone modem) is extremely slow and will severely hamper the quality of transmitted audio and video. Compressed video is two-way video and two-way audio connections via fibre optics. Fibre optics represents very high transmission quality, as there is no electrical interference and minimal loss of signal strength over distance (World Bank). It provides fully interactive, multimedia connectivity (Truman, 1995).

There are some advantages and disadvantages to using video-based instructional technology. It permits both audio and video communications; essentially, it is as if one were physically present at the course. Video “facilitates personal feelings” (Barron, 1999). It adds the human element by allowing for the observation of facial expressions and body language. The synchronous characteristic of many video-based technologies fosters an interactive environment. It is “effective for introducing, summarizing and reviewing

concepts” and can be a motivational tool (Willis, 2003). The disadvantages to video-based media are the costs. The purchase and upgrading of the necessary technologies can be expensive. Creating, facilitating, or conducting video-based distance education requires much planning and preparation, scheduling must be taken into consideration and the employment of these technologies can require a technical support team (Verdurin & Clark, 1991).

### *Computer-Based*

The introduction of computers as an instructional tool represents the fourth generation of advancements in delivery methods (Bourdeau and Bates, 1997). The combination of increased recognition of the importance of computers in education, increased Internet usage and the advances in the technological power, capabilities and versatility of computers has led to its adoption as a means of delivery for distance education. Computer-based instructional technology or computer-based communications includes the Internet; online databases; hypertext; multimedia; email, bulletin boards and Listserves; computer conferencing; web-based education; and CDROM/Computer Based Training.

*The Internet.* The Internet “provides hypermedia (point and click) access to instruction which is linked with hypertext” (World Bank). Essentially the Internet is an interactive environment combining text, audio, and video in both a synchronous and asynchronous format. ‘(The Internet)...combines media advantages of other media so that it conveys video and sound better than a book, is more interactive than a videotape and, unlike a CD-ROM, it can link people from around the world cheaply’ and it is both a content provider and delivery system (McManus, 1995). However, the disadvantages are

that access and use of the Internet are restricted to those that possess or have access to a computer, hook up and the technical skills and know how to surf the Internet.

*Online databases.* A database is a defined set of information or data designed for a specified purpose. An online database is one that is made available for access over the Internet. Online databases can include such things as library services (i.e., online card catalogue), dictionaries, journals, etc.

*Hypertext.* Hypertext is a computer-based retrieval system that uses links between documents that can be accessed by clicking on the hypertext link or “hot spot”. Text, audio, graphics, and video can be linked.

*Multimedia.* Multimedia refers to the combining of text, data, audio, graphics, and video via digitised format, in an integrated manner that permits students to access and interact with it according to their choosing.

*Email, bulletin boards and Listservs.* Email is computerized mail or messaging that provides asynchronous one-to-one or one-to-many communication. It involves sending text messages from a computer over a data network (e.g., Internet) to one or more recipients’ “mailbox(es)”. One can attach files such as text documents or sound, graphics, audio and video files to an email. A bulletin board is an electronic forum where messages can be posted, read and commented on. Users of bulletin boards form discussion groups on the topics of that particular board. A Listserve is an automated email distribution system; it automatically distributes an email to all the members of the Listserve. Email communications are advantageous in that they are easily accessed at any time or place with Internet access, permit the sending of additional information in the form of attachments, and it is relatively inexpensive to open an email account. The disadvantage lays in first having to have an Internet connection or access, and learning the technology and processes

required to opening an email account, writing, sending and receiving an email and attaching documents or files.

*Computer conferencing.* Computer conferencing is synchronous two-way communication via Internet chat, shared whiteboards and desktop multimedia conferencing. Online chat is a two-way text exchange similar to that of an email but synchronous in nature. One can chat through such applications as ICQ or in “chat rooms”. Shared whiteboards or computer conferencing systems are more complex versions of the Internet chat or bulletin board that permit multi-party synchronous communications. As specialized software, it provides features that help to organize, structure, search and retrieve messages, and post graphics in an online group environment (World Bank).

Desktop multimedia conferencing is a medium that provides multiple methods of communication that range from synchronous two-way video, two-way audio and two-way text communication or any combination thereof, and, file sharing; depending upon which applications are employed at any given moment. The obvious advantage of computer conferencing is its real time communication, while the disadvantages are similar to that of email and one additional disadvantage – the software may limit the number of concurrent users (Barron, 1999).

*Web-based education.* The advent of the Internet has created a new medium upon which distance education can be promoted and disseminated. Teachers can create interactive Websites, post information, provide relevant links to WebPages of interest and so forth. Distance education and the Internet have advanced enough that entire courses are now offered over the Internet.

Asynchronous learning networks and synchronous electronic classrooms have been developed. Asynchronous learning networks remove the need for classrooms and buildings.

Instead of attending traditional classrooms students access relevant Websites, chat rooms, bulletin boards and instructional materials at their own convenience. Email is the method of contact between teacher and student, and student and students.

Electronic classrooms are virtual in nature. Synchronous, electronic classrooms require that students log on at predetermined times and receive instruction, chat and undertake various activities. The advantages are the near complete removal of geographical restrictions on students and teachers and the retention of many of the pedagogical values associated with conventional education, as opposed to a traditional correspondence course. Difficulties include the pedagogically competent construction of such classes, and the initial costs associated with their development. Access to a computer and Internet may restrict students from taking advantage of online classes.

*CD-ROM/computer based training (CBT).* CD-ROM's can be used to store vast amounts of information. As such, CD-ROM's are often employed to be the carrier of computer based training (interactive distance learning) that would normally be offered exclusively online due to its large size. The information or programs are installed and burned onto a CD-ROM, which can be accessed through a computer with a CD-ROM drive. An advantage of this instructional technology is that one does not require Internet access, however, the drawback is that there still remain hardware and software requirements and the technical know-how. Furthermore, CD-ROM's must be handled carefully, since they can be easily scratched and a scratch can ruin the information they contain.

There are many advantages of computer-based instructional technologies. The student is permitted to study at his or her own pace. Computers are a multimedia tool; text, graphics, audio and video can be incorporated into the programs (Willis, 2003). It facilitates

a high level of interactivity. Access to the Internet is relatively inexpensive and it can be accessed from almost anywhere in the world (Barron, 1999). There exist a number of disadvantages as well. The necessary hardware and software must be purchased or access to them provided. Technology is constantly changing. Although multimedia can be employed, the majority of communications occur through text. For computer-based media to be successful the instructor must plan and prepare, and yet there is no guarantee of success (Barron, 1999). Last there is always chance of technological problems (i.e., a system crashes, a virus, etc.).

~ ~ ~

There are many instructional technologies available for the delivery of distance education. Each medium and its specific technologies have their own unique characteristics and advantages and disadvantages. There are more traditional methods such as print and audio and more recent high-tech additions such as compressed video, desktop multimedia conferencing and asynchronous and synchronous classes. Some technologies are employed as an exclusive delivery means for a class, but this is the exception. More often, an integrated approach is adopted and numerous educational technologies are employed; taking advantage of what each has to offer so as to best meet the needs of the students and to provide an optimum learning experience within the constraints faced by the educational institute.

### **E. Instructional Technology for the School of Public Administration (SPA)**

Often the development of delivery platforms is decided upon and designed intuitively, based upon past experience and knowledge on distance education instructional strategies. However, there exist a number of commonly agreed-upon questions that can be referred to, to aid in the selection of suitable instructional technology(s) for delivering distance education programs or courses (Bååth, 1983; Rowntree, 1994; Olcott, 1999). These questions examine the salient factors necessary to the selection of technologies, (for a summarized list of these questions refer to Appendix C). Similar questions are presented in the form of seven factors formed by the acronym of Bates' (1992) ACTIONS model, (refer to Appendix D).

The breadth of these questions is too vast for the specific purpose of selecting a suitable instructional technology for a post-secondary distance education leadership or management exercise or assignment that mimics a group-based organizational analysis. A version of these questions and factors must be tailor made – discarding aspects related to distance education program development and consolidating the remaining questions and factors into concise questions. Furthermore, a functional approach towards technology selection is adopted to ensure brevity and the applicability of questions specific to the selection of an appropriate technology for a School of Public Administration leadership/management post-secondary distance education course exercise or assignment. This functional approach is further reflected in the incorporation of three variables in the development of the questions: the course, the students and the School of Public Administration. Each variable is the focus of one of the three questions to be used for the selection of the instructional technology:

1. What is the course and what are the objectives of the assignment/exercise?

2. What are the (potential) characteristics of the student?
3. What technologies are available to, and what technologies are traditionally provided by, the School of Public Administration?

Two steps are required to effectively employ these three questions for selecting instructional technology. First, each question is individually examined and answered in turn. Second, the answers to the three questions are then examined together under a holistic lens, permitting the selection of an appropriate educational technology that best supports all three of the questions and subsequently each of the variables.

*1. What is the course and what are the objectives of the assignment/exercise?*

The course objectives for the development of exercise(s), assignment(s) and support tool(s) of a leadership/management class are the following:

- To retain the pedagogical value of team-based exercises.
- To present sufficient in-depth information for proper organizational research and analysis.
- To provide an interactive, true-to-life alternative to the traditional case study approach of just reading an article commonly employed when examining issues.
- To incorporate digital technology where possible to best facilitate the learning experience.

To determine what technologies are best suited for these objectives the Pennsylvania State University Media Selection Matrix (Luck, 1997) is utilized. (For the Matrix in its entirety refer to Appendix E: Pennsylvania State University Media Selection Matrix.) The Matrix

divides instructional technologies into three levels of technology: 'low tech', 'medium tech' and 'high tech'. Instructional strategies (e.g., small group discussion, interview, research, etc.) are applied and the varying instructional technologies in the three technological levels are listed. The following seven learning strategies are consistent with the exercise and its objectives: small group discussion, case study method, interview, field experiences, role-playing, simulations, and research. Table I.4 represents a consolidation of the applicable technologies as applied to the 7 learning strategies.

Table I.1 Learning strategies and applicable instructional technologies in the Media Selection Matrix (Source: Adapted from Luck, 1997).

INSTRUCTIONAL STRATEGY		LEARNING STRATEGY						
		Small group discussion	Case study method	Interview	Field experience	Role-playing	Simulations	Research
‘Low Tech’	Paper		X					
	Video tape		X		X		X	
	Audio tape		X		X			
	Email	X	X	X		X		X
	Listserve	X		X		X		X
	Local resources			X	X			X
	Phone	X		X				
‘Medium Tech’	Audioconferencing	X	X	X		X		
	Web-based resources		X		X	X	X	X
	FTP							
	Newsgroups		X	X				
	Existing software					X	X	
	Conference call							
	Fax							
	Voice mail	X						
‘High Tech’	Telnet					X		X
	2-way videoconferencing		X	X				
	Satellite				X			
	Desktop videoconferencing	X		X				
	Web-based resources (w/plugins)			X	X	X		X
	Audiographics		X					
	RealAudio				X			
	RealVideo				X			
	Multimedia		X				X	
	Computer conferencing	X	X	X				
	Chats	X		X				
	Web-based telephony	X						
	Shared workspace	X						
	Digital drawing pads							
Hand-held scanners								

2. *What are the (potential) characteristics of the student?*

The word potential appears in parenthesis to highlight that this is the first time the program is offered by the School of Public Administration and there is no hard data available on students enrolling in this program. However, the very nature of an online post-secondary distance education program itself permits safe and, in many cases, logical assumptions and inferences of certain student characteristics. Learners are adults from differing geographical locations. They are educated, at least at the post-secondary level, some are professionals, and all are familiar with modern technology. The students enrolled in the class are enrolled because it is offered online; as such, it is assumed that students will have access to the Internet and have high expectations towards the technological offerings of the course and its components (i.e., students will not be satisfied with simply reading course packs and sending their assignments for grading via email). However, not all students will possess the same level of Internet access or computer capacities, thus limiting the extent to which advanced forms of technology can be offered. Students will desire variety (e.g., multimedia). Furthermore, students are likely pursuing online studies as it accommodates their hectic schedules, as such studying when and where they want will be important. The support for print-based instructional technology cannot be overlooked, as virtually all students are comfortable with its use.

Applicable instructional technologies based upon learner characteristics are computer-based technologies with multi-media platforms or other technologically advanced systems that permit access to needed information when and where they want. The use of textbooks and other print material is supported.

*3. What technologies are available to, and what technologies are traditionally provided by, the School of Public Administration?*

One of the primary steps when selecting instructional technology is to establish what technologies are available for the delivery of a distance education class (Rowntree, 1994). The School of Public Administration provides flexible distance learning courses, by employing multiple instructional technologies: primarily print- and computer-based. In terms of print-based instructional technologies, the school has used textbooks, course readers, study guides, course syllabi and case studies. Computer-based educational technology has included email, Internet, bulletin boards, and course websites (e.g., WebCT). There has been some use of fax for sending assignments and phone for contacting professors. In specific circumstances, telephone and video conferencing have been used. Media employed has generally provided either asynchronous one-way or asynchronous two-way communications limited to print (either hard copy or via the Internet), with the exception of phone, telephone and video conferencing. The primary delivery method has been computer-based with print-based serving as the complementary method.

Applicable instructional technologies based upon their employment and availability at the School of Public Administration includes asynchronous two-way computer-based technologies, some phone communications and phone and video conferencing.




*Selecting the Instructional Technology*

Having reviewing course objective-based, learner characteristic-supported and available instructional technologies that emerged from the questions, I will now re-examine the

Matrix to identify common trends and select the most appropriate instructional technology(s).

Table I.2 Selecting instructional technologies with the Media Selection Matrix (Luck)  
 Source: Adapted from Luck (1997).

INSTRUCTIONAL STRATEGY		LEARNING STRATEGY						
		Small group discussion	Case study method	Interview	Field experience	Role-playing	Simulations	Research
‘Low tech’	Paper		X					
	Video tape		X		X		X	
	Audio tape		X		X			
	Email	X	X	X		X		X
	Listserve	X		X		X		X
	Local resources			X	X			X
	Phone	X		X				
‘Medium tech’	Audioconferencing	X	X	X		X		
	Web-based resources		X		X	X	X	X
	FTP							
	Newsgroups		X	X				
	Existing software					X	X	
	Conference call							
	Fax							
	Voice mail	X						
	Telnet					X		X
‘High Tech’	2-way videoconferencing		X	X				
	Satellite				X			
	Desktop videoconferencing	X		X				
	Web-based resources (w/plugins)			X	X	X		X
	Audiographics		X					
	RealAudio				X			
	RealVideo				X			
	Multimedia		X				X	
	Computer conferencing	X	X	X				
	Chats	X		X				
	Web-based telephony	X						
	Shared workspace	X						
	Digital drawing pads							
Hand-held scanners								

**Key**  
 Technologies that support the learning objectives (i.e., learning strategies)  
 Reflective of learner characteristics  
 School of Public Administration available technologies and preferences

Note: To interpret the table, attention is focused on those colours that are a result of a mixing of the original three colours; these “mixes” represent where more than one element supports and is supported by the use of that instructional technology(s). (e.g., where both learner characteristics and technologies that support learning objectives are present the yellow and blue will be combined to form green.)

For all three variables there is overwhelming support for web-based resources, web-based resources (w/plugins) email and Listserv. Realaudio, realvideo, multimedia, software and paper are supported by the School of Public Administration and learners. Computer conferencing is selected by learners and support the learning objectives.

It is evident that there is strong support for the typical online distance education class as already provided by the School of Public Administration. In terms of the exercises and assignments, there exists a continued trend towards increased use of technology. Furthermore, SPA and learners would like to see courses employing even more technology such as multimedia and Realaudio and Realvideo. Taking these factors into account the following is proposed:

*Create a virtual organization multimedia database, one available online in a hypermedia environment, that serves as a backdrop for which case studies, exercises and assignments can be developed and built around.*

A virtual organization multimedia database can provide an alternative to the traditional methods of conducting case study exercises, reading articles, and further the School of Public Administration's push towards incorporating digital technology in their distance education delivery. A virtual organization multimedia database can provide the necessary in-depth information for proper organizational research and analysis. An asynchronous electronic platform permits it to be readily available on the Internet, accessed at anytime and anywhere by students. Developed in a multimedia/hypermedia format it can foster an interactive learning environment, one where students can take the initiative. This method retains much of its original pedagogical value and has the potential of adding the additional

experience of working in a virtual organization. Students are able to undertake team-based activities and assignments, communications, and access the virtual organization database for research via the Internet, regardless of their geographical location. This would serve to mimic real world virtual organizational work.

Selecting a multimedia database as the appropriate instructional technology for the School of Public Administration is but the first step towards the development of a working educational tool. There is need to further develop the database concept and explore how it would function. It is necessary to determine how and with what information the database is to be populated. A working case study that embraces the organizational information offered by the database in a manner that mimics SPA group-based organizational analysis needs to be developed. These tasks and challenges are explored and confronted in the remaining sections of this report.

## **PART II – THE VIRTUAL ORGANIZATION**

The creation of a multimedia database that houses the organizational information of real-world organizations is a project that the School of Public Administration is undertaking in conjunction with Distance Education Services. Certain aspects of its development and creation, namely the technical aspects, are outside the scope of this report and not included in the following pages. Distance Education Services will build the physical database. This section is limited to reviews of current practices in on-line management and leadership courses. They include illustrating the role of the database in ADMN 507 a SPA on-line class; identifying the types of organizations and organizational information to be included in the database; assessing the availability of such information and the results of subsequent gathering, and providing advice on the maintenance and future developments of the database.

### **A. Instructional Technologies in Management and Leadership Courses: Best Practices**

A review of best practices for the employment of instructional technologies in management and leadership courses may offer ideas beneficial to the development of SPA distance education classes of the genre, and in particular, the development of the multimedia database, and exercises and case studies for use with it. Research for this topic was intended to include both personal opinions gained through correspondence from directors, co-ordinators and practitioners in the Ontario region, and information garnered from course Websites and literature research. Email inquiries to directors, co-ordinators and practitioners of distance education programs have been unsuccessful, going unanswered –

perhaps because contact was made during the summer months. A review of several course Websites suggests the novelty of the approach adopted by SPA, indirectly supporting the development of a virtual organization and subsequent case studies. There is scant literature on the topic; however, what is available does offer some suggestions.

The key observation derived from a review of administrative and management course Websites (among them prestigious Masters in Business Administration Programs where access is permitted), suggests that many distance education courses are limited to the traditional case study approach. An approach where students are not truly active learners, but rather, read an article and then comment on it in one fashion or another, be it through a bulletin board or a written assignment. Distance education courses offered online are not wholly taking advantage of the technological offerings of an Internet platform, aside from using it as a means to present print-media to students. The use of the Internet in terms of presenting a virtual organization and interactive case studies is innovative and presents opportunities to capture additional pedagogical values that escape the traditional case study approach employed by so many.

There exist some innovative uses of instructional technology for conducting case studies, simulations and role playing activities. The Massachusetts Institute of Technology has developed “Hypercase”, a multimedia project that permits students to interact with the case under study. Students are provided with a videodisk that contains edited interviews and demonstrations, which help them to explore business administration methods of research and analysis.

A Management Practices course at the New Jersey Institute of Technology integrates a business simulation game with computer conferencing. Students are assigned to groups each consisting of four students. Each group represents a company, and each student

is either the CEO, Financial Officer, Operations Chief, or Marketing Executive. Companies compete against each other in the business simulation game, through the start-up, growth and independence phases. Students establish key data (e.g., price, advertising, purchase, production, size of sales force, etc.) and submit it to the teacher who then enters the data into the game. The game outputs data (e.g., units sold, back orders, market share, operating income, income tax, etc.). Students are then evaluated based upon the success of their companies compared with others. Computer conferencing is employed to allow students to discuss the input and output data and other management topics or concerns.

Computer conferencing has been used to conduct both simulations and role-playing. An international business negotiation course developed by the University of Maryland, University College and the University of Maryland, College Park simulates the stress and timing of negotiations via synchronous computer conferencing. The University of Michigan uses computer conferencing for Arab-Israeli conflict simulations.

Incorporating visually recorded interviews for case studies (multimedia) and the integrated components, simulation and conferencing, of the business administration game into SPA course materials and exercises may prove beneficial. The use of video for interviews permit students to review verbal and non-verbal clues, not captured in print, yet “essential to the decision making process” (Lamb, 1992, p.37). Perhaps recorded interviews can be incorporated into interactive case studies that are to be developed for use with the virtual organization database. Integrating elements offered online with those offered via the teacher, permit students to undergo simulations that if offered solely online could only be realized through very advanced simulation software. Further explored, this concept may prove a good framework for creating SPA exercises and interactive case studies.

### **B. The Virtual Organization Database and SPA Courses**

The virtual organization database is to be used with the online version of ADMN 507 – Managing from the Middle. ADMN 507 has been traditionally taught using the conventional approach requiring students to attend classes on-campus. It is a requisite management / organizational theory class that all students take in the first semester of studies.

Course content, exercises, simulations, assignments and readings of Managing from the Middle are designed to introduce students to the literature and framework for understanding interpersonal and organizational dynamics, and to build competency in a range of managerial skills. Topics included in the course are managerial effectiveness, personal learning styles, analytic approaches, written and interpersonal communication, conflict management, gaining power and influence, creating and working through teams, problem solving and decision making, and the integrative competing values (Master Manager) framework (Lindquist & Vakil, 2003).

Figure II.1 ADMN 507 course logic model and the virtual organization database

Source: Adapted from 4.Course logic (Lindquist & Vakil, 2003)

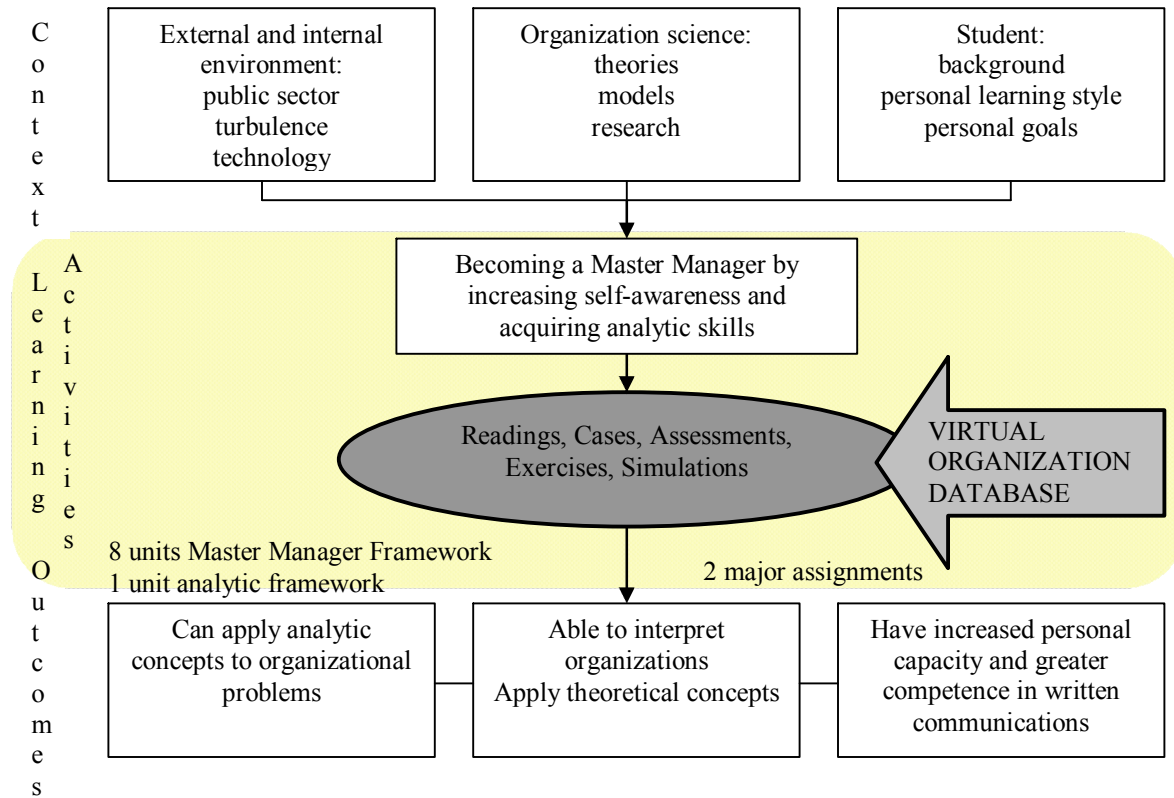


Figure II.1 illustrates that the virtual organization database is intended to support the “Learning Activities” stage of the ADMN 507 course logic model. Specifically, it is to serve as an electronic support tool for “Readings, Cases, Assessments, Exercises, Simulations”. While the virtual organization database can be used in a variety of class assignments, exercises or simulations, both brief and extended, for the moment, it has only been explicitly stated for use in Unit 12 – there are 12 individual course units. Unit 12, a major team project entitled Addressing an Organizational Challenge, has the following learning objectives: practice working in virtual teams; and be equipped to address gaps in ones own organization (or a virtual organization) and able to apply tools learned in the course. The virtual organization database will function to supply relevant organizational

information and documents upon which student teams without access to a real organization can conduct and base an organizational analysis within a framework and context established by a yet to be determined case study.

### **C. Creating the Database**

The virtual organization database is to provide “a realistic setting which allows students to apply their knowledge of appropriate concepts and techniques” (Crowther & Barnett), and, lends itself to a variety of course settings, exercises and perspectives in, but not limited to, organizational analysis. The database requires that it be designed with its intended uses in mind and populated with relevant information. Furthermore, it is necessary that the database be not limited to only one public sector organization and subsequently only reflecting one public sector organization type.

For the purposes of this project six organization types have been identified as existing within the public sector. There are three government types or levels: municipal or city, provincial and federal. There are two types of not-for-profit organizations: social service agencies that provide direct service delivery (e.g., Victoria Cool-Aid Society) and others (e.g., YMCA or United Way). Finally, there are aboriginal organizations. It was originally intended that the database should include one organization for each organization type. Unfortunately, after conducting both an Internet survey and contact attempts with organizations it was decided that there was just too little readily available information on aboriginal organizations to include them in the project at hand. As such the database will include an example of each of three levels of government, and the two not-for-profit organizations.

The information to be included for each organization type falls under six categories: planning, organization, programs, reports, training and development and financial. These categories serve two purposes. They constitute a framework under which the majority of key organizational information from any organization type will fall, thereby permitting the robust representation of an organization in the database. Furthermore, to create a database it is necessary to form fields into which data can be entered and later accessed. The categories as fields permit access to specific pieces of information, versus accessing 'clumps' of information in their entirety. Information to be included under each category, where available, is as follows:

*Planning* includes strategic plans or in the absence a strategic plan any strategy, overall policy or set of objectives for the organization. And, service plans, or in the absence of a service plan, any plan that sets out in some detail objectives to be achieved together with measures to be used.

*Organization* includes organization charts in as much detail as possible; information about the number of employees, if possible broken down by union/non union and types of union; job descriptions (optional); demographic data (optional); and, any collective agreements.

*Programs* includes listings of all programs with detailed descriptions of the programs, including intended clients or groups of clients.

*Reports* includes annual reports, or in the absence of an annual report performance reports of any description; and, statistics about programs in terms of inputs/outputs, outcomes and other relevant data that demonstrates how the programs perform.

*Training* includes any listings of in-house training programs or programs accessed by employees; and, any information about developmental policies and activities including information about who pays for training and development.

*Financial* includes information about budgets, overall and by responsibility.

### *Retrieving the Information: Internet Research and Contacting Organizations*

At the outset of this project it was decided that information used to populate the database was to come from the public domain (i.e., available on the Internet). This decision was based upon three points: the Internet likely provides the majority of the desired materials; the Internet permits efficient and expansive research; and information garnered from the Internet falls under the public domain granting ease of access and rights of usage to that information.

A tedious survey of nearly 50 Canadian public sector organizations was undertaken, but available on-line organizational information fell short of expectations. No organization reviewed presented a complete array of information (according to the categories). The closest to complete are Ministries of the BC Provincial Government and the Chief Information Officer Branch of the Treasury Board Secretariat (TBS), Government of Canada (GoC). Very few possessed more than an annual report and some general program or fiscal information found within the report itself, (for a summary of the Internet research methodology, the findings and recommendations refer to Appendices F and G). Internet Research Findings Matrices.)

For the database to be of pedagogical value and worthy of the resources invested, further research was required to compile a more complete set of organizational information.

It was decided to approach individuals from promising organizations. Organizations were selected in consultation with my thesis advisors. These organizations were: Victoria Cool-Aid Society, United Way of Victoria, City of Vancouver, Western Economic Diversification, and the Nanaimo-based Aboriginal Health Society. Organizations for which information was already available on the Internet included the Chief Information Officer Branch, TBS, Government of Canada, and for the Ministry of Health Planning and Health Services, BC Provincial Government.

All organizations were sent an email expressing SPA's desire to use the organizational information available on-line and a request for further information, (see Appendix H). Communications were not restricted to emails, and eventually included both telephone and fax communications to initiate contact and follow ups for addressing questions and concerns. Acquiring information via direct contact was also challenging, protracted, and in some cases fruitless. Often dialogue with organizations was difficult to co-ordinate or was not acknowledged and went without response. However, organizations that responded co-operated and were pleased to aid SPA in its endeavours despite their own limited resources to gather requested information. They found the project to be an interesting concept but did raise concerns regarding who would have access to the information and that information provided might not be the most up to date information. These concerns are addressed later in this section.

Information, both in digital and hard copy, has been provided via contacts from the Victoria Cool-Aid Society, United Way of Victoria, City of Vancouver and Western Economic Diversification. Information available on the Internet has been retrieved on the Chief Information Officer Branch, and the Ministries of Health Planning and Health

Services. Information gathered to date for each organization in the context of the information categories appears in Table II.1., (see Appendix I).

For this report, material for the database is nearly completed. Further information is expected from City of Vancouver, Western Economic Diversification and Chief Information Officer Branch. I will continue to work with Continuing Studies to complete the database.

Table II.1 Organizations and information gathered or received

Organization	Category					
	Planning	Organization	Programs	Reports	Training	Financial
Not-for-Profit: Victoria Cool-Aid Society	✓	✓	✓	✓		✓
Not-for-Profit: United Way of Victoria	✓	✓	✓	✓		✓
City-Level Gov.: City of Vancouver	✓	✓	✓	✓	✓	✓
Provincial-Level Gov.: Ministry of Health Planning	✓	✓	✓	✓	✓	✓
Provincial-Level Gov.: Ministry of Health Services	✓	✓	✓	✓	✓	✓
Federal-Level Gov.: Chief Information Officer Branch, TBS	✓	✓	✓	✓	✓	✓
Federal-Level Gov.: Western Economic Diversification	✓		✓	✓		✓

### **PART III – THE CASE STUDY**

The final stage of this project and report is the development of a case study that facilitates the pedagogical application of the database and its information; a fictional case study that utilizes the database as a backdrop upon which to base its characters, organizational dilemmas and challenges and narrative. The case study is to be created for use with the Admn 507 on-line class, cognisant of its key themes and content, and assignments. Specifically, the Competing Values Framework should be incorporated into this case study, and the case study should also be of magnitude in terms of the organizational dilemma to lend itself for use in a major, team-based assignment.

#### **A. Creating the Case Study**

Before the creating/writing process of the case study took place three key decisions were required. Namely what major organizational theme or dilemma should be the focus of the case study? Which organization should be used? How to incorporate the Competing Values Framework into the case study? What Competing Values Framework conflicts should be included?

At the time of developing the case study, information gathered was most complete for government organizations. As such, it was decided to use one of those organizations for the case study. To this end, both the Ministries of Health Planning and Health Services of the BC Provincial Government were selected to be the organizations featured in the case study. If presented together, the two organizations, similar in thematic nature and responsibility, could offer very robust organizational information. Furthermore, if

combined in a case study, these two organizations offer the potential for unique dialogue, both within and transcending each ministry, and opportunities for incorporating the Competing Values Framework not limited to any one level of the organizations.

The organizational challenge adopted for the case study was merging the Ministry of Health Planning and the Ministry of Health Services into a single Ministry of Health. This permits the functional incorporation of the two ministries into one case study, and furthermore, presents a current organizational challenge, change management, prevalent to many managers and organizations.

The Competing Values Framework can be incorporated into the case study by building its inherent tensions, foci (internal versus external) and structures (flexible versus rigid) into the characters presented in the narrative. Character detail and description can be presented as told by the characters themselves. Information presented in this manner, characters as narrators, further adds a degree of realism, as if it was shared through in-person interviews or meetings.

### **B. Merging the Ministries of Health Planning and Health Services – An Outline**

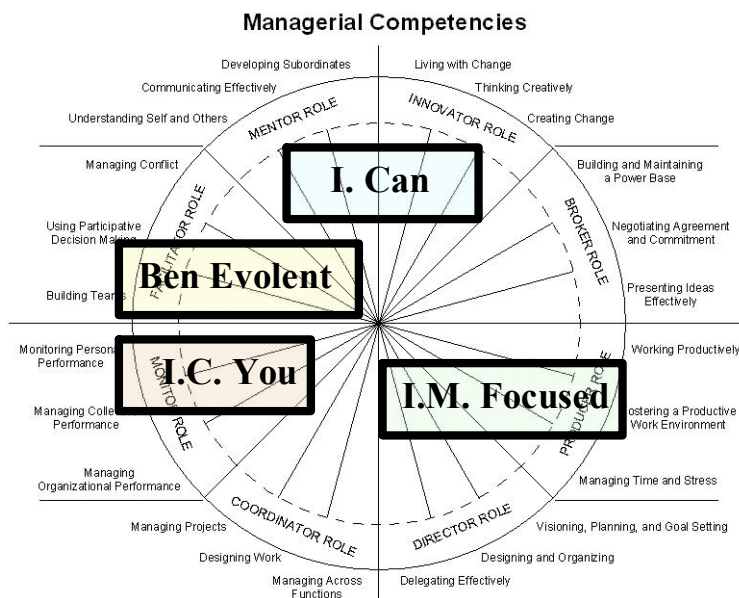
The student(s) is presented the case study information through the eyes of a consultant contracted to aid a four-member ministerial appointed team, the Ministerial Merger Team, to merge the Ministries of Health Planning and Health Services of the BC Provincial Government. The ministries are expected to be fully merged and operational with budget cuts to the administration of programs and services of up to 5% by the end of the fiscal year 2004-05. Further the reader(s) is presented with a recap of the rendezvous that occurred a week before with each member of the Ministerial Merger Team: Ms. Iris Margarett

Focused and Mr. Ben Evolent from Health Planning and Mr. Ian Can and Mrs. Iesha Cathy You from Health Services. The case study concludes by indicating that the following week the consultant is to meet for the first time with all the members to discuss and decide upon the appropriate course of actions for the merger.

The characters are directors from real divisions within the ministries. Both operating budgets and FTEs and division responsibilities are described. If figures were unavailable, these numbers were created based upon ministry core business area fiscal and HR information. Each character possesses strong managerial competencies towards specific managerial roles of the Competing Values Framework, as described through their names, actions, dialogue and surroundings. Together the four characters fill all four quadrants of the Competing Values Framework, and create potential conflicts inherent to their opposing characteristics, (for the entire case study see Appendix J).

Figure II.2 Placement of case study characters in the Competing Values Framework

Source: Adapted from Managerial competencies (Belasen, 1998)



*Ms. Iris Margarette Focused*, or more obviously, *I.M. Focused*, has both producer and director traits. She arrives in a whirlwind, laying out her plans, delegating instructions, and courses of action for the merger team. In her opinion, she and her division is the helmsman of Health. As director of Policy, Planning and Legislation Division, Ministry Health Planning, she is in charge of a \$7 M operating budget and 50 FTEs.

*Mr. Ben Evolent* is as the name implies – a really nice guy. Between seeing him practice Tai-Chi to listening to him speak accompanied by incense, he is presented as a humble and concerned facilitator, almost guru-like, whose approach is one of team building and participation. He is director of Strategic Change Initiatives Division, Ministry of Health Planning, and works with a \$1.5 M operating budget and 20 FTEs.

*Mr. Ian Can*, or *Mr. I. Can*, is the enthusiastic former private sector entrepreneur who is now standing director for Strategic Initiatives and Corporate Services Division, Ministry of Health Services. The division has an operating budget of \$60 M and 250 FTEs. He is presented as an innovator, always ready for change and improvements, but with strong mentor qualities, indicated through his willingness to discuss the consultant's career and provide advice.

*Mrs. Iesha Cathy You*, or *I.C. You*, is a monitor. Her office is littered with documents and performance information, her entire dialogue on her recently adjourned meeting to her children focuses on evaluation and performance. She is director of Program Management and Framework, Ministry of Health Services with an operating budget of \$25 M and 100 FTEs.

The prepared case study, *Merging the Ministries of Health Planning and Health Services*, functions on two levels: practical and pedagogical. First and foremost, it is the means by which the virtual organization database is utilized. It incorporates information

housed within the database into the story itself. The student(s) must refer to Ministry of Health Planning and Health Services organizational information to gain further insight into the problem posed by the merger, and to develop suitable recommendations and suggestions.

This case study provides the means by which the Competing Values Framework can be subtly and fluidly integrated into the course assignment through the characters themselves. The student(s) encounters characters displaying characteristics of the managerial roles identified in the Framework. Identification and an understanding of these managerial competencies and characteristics are required for the student(s) to work, albeit in a fictitious sense, with the characters, and propose suitable recommendations and suggestions.

Last, the design of this case study permits great flexibility in terms of assignment and exercise development. Exercises and assignments can be developed that take advantage of the organizational issues of change management and Framework either individually and independent of each other, or together. Such assignments could include: the student(s) provides recommendations on the issue of change management for merging the Health Ministries; the student(s) identifies, analyzes and recommends how to work effectively with the different manager types/roles represented by the characters; or, the student(s) assumes the role of one of the characters and provides recommendations on the merger according to the managerial role of that character.

## **PART IV – IMPLEMENTATION AND OBSERVATIONS**

There exist a number of issues and points that should be addressed for the successful implementation of the virtual organization database. These issues and points fall under three themes: aspects of its design and construction, addressing gaps in existing organizational information; and the applicability of the database and its organizational information for use in on-line classes.

Two common concerns surfaced when discussing the use of organizational information in the database. Organizations required assurance that the only persons with access to the information would be the School's faculty and registered students. Second, organizations required that a disclaimer would be used that would not guarantee the accuracy of the information and that the organization cannot be held responsible. The first concern was foreseen when discussing the project at the initial stages. It was quickly addressed in telephone discussions with the organizations and any apprehension was alleviated. They were assured that the information was specifically for use in SPA distance education classes and would be for faculty and students only. A disclaimer can be incorporated into the design of the database and/or in course assignments using database information. It should state that there is no guarantee of accuracy for the organizational information housed in the database/used in assignments and that the organization cannot be held responsible for the accuracy of its information found within the database.

A potential post-construction or maintenance issue is the discovery that certain information should be defined in a different way than currently done (e.g., contents are to be defined in smaller and smaller units or categories), or additional information outside the established categories and fields should be included (e.g., videos of virtual interviews).

While such changes are not impossible, in database design it can be very difficult to make changes once the fields and links have been established. A database can only do that which it is designed to do. Therefore, a caveat is that the initial developmental analysis of the database both in terms of its future uses, both potential and actual, and the information contained within, is paramount in many respects to its user-friendliness and success. Perhaps, as more assignments, exercises and related materials are created for use with the database, an expansion might be required or another database constructed to house this information.

Particular pieces of information yet to be gathered, as identified in Table II.1 and Appendix I, should be addressed where possible. Efforts to remedy the lack of an aboriginal organization should be made if resources permit.

Once constructed, the virtual organization database will continue to be pedagogically valuable only while its contents are relevant to the exercises developed for it. This relevance may not be entirely dependent upon how dated the organizational information is, but rather the applicability of that information. That is to say, how well the contents are able to reflect or be employed to illustrate the issues of the day when used in course exercises.

Evaluating the course exercises as they pertain to the database should be undertaken at the end of each course session to determine the effectiveness of those exercises in utilising the database, and the extent to which the database contents support the exercise by supplying necessary and relevant information. When evaluating it is important to carefully discern between a poorly designed exercise, one that does not fully utilize the database and what it has to offer through creative curriculum design, from poor database contents that fail to support an exercise or particular organizational issues. Seeking feedback from both

students and professors, and examining the course and assignment objectives should help to clarify the true reason behind poor results.

Whatever changes are sought, access to the database should be limited to only a handful of individuals to ensure that the integrity of the database is maintained and that changes are not conducted in an adhoc manner, but rather in a co-ordinated and communicated fashion. If it is found that exercises do not fully or properly utilize the virtual organization database, there is need for greater attention to be paid to course and assignment design. Course and assignment design can be left to the professor at hand, or better yet, undertaken by a course design team made up of both professors and technical experts, among others. If database contents are found to be out of date, they could be updated by a teacher's aid or research assistant under the watchful of eye of a professor. Organizations participating in the database have already been informed and were agreeable that SPA may approach them in the future for the purposes of updating. The task would simply require returning to those organizations that appear in the database and gather the updated organizational information.

### **Observations**

Distance education delivered via the Internet is an educational trend that cannot be ignored. The School of Public Administration is wise to provide online courses, and not limit itself to providing only a conventional on-campus format. It should, however, seek to set itself apart from the all too prevalent, run-of-the-mill distance education classes offered by many universities; taking advantage of the potential that an online platform has to offer. The vast majority of online management and leadership classes reviewed utilized the online format

for little more than a paper substitute and at times a discussion board. Creating the virtual organization database may not be the pinnacle of technological achievement for pedagogical purposes, but it is a definitely a step in the right direction. The virtual organization provides a new approach towards the traditional case study.

The virtual organization database is designed as a functioning educational tool that can be immediately integrated with other online activities in SPA distance courses. Case studies can be designed for its application for other courses such as marketing, strategic planning, and human resources. From a certain perspective, the database is also a pilot project. If found to be effective, the database could prove to be the blueprints for the development of a more advanced and sophisticated virtual organization. A database that could include digital video or audio of mock interviews and greater levels of detail such as individualized or personalized employee background information or organizational information specific to thematic areas of course study for more interactive and realistic case study exercises and simulations. All this will be determined overtime depending upon student and faculty response to the database.

## REFERENCES

- Aggasiz, E.C.** (1971). Society to encourage studies at home. In O. MacKenzie (Ed.), *The changing world of correspondence study*. University Park: Pennsylvania State University Press.
- Albright, M.J., & Graf, D.L.** (Eds.) (1992) *Teaching in the information age: The role of educational technology*. San Francisco, California: Joessy-Bass Inc.
- Bååth, J.** (1983). A list of ideas for the construction of distance education courses. In Sewart, Keegan & Holmberg, *Distance education: International perspectives* (pp. 272-90). New York: St. Martin's Press.
- Barron, A.B.** (1999). *Teacher's guide to distance learning*. Florida Center for Instructional Technology, College of Education, University of South Florida. Retrieved June 12, 2003, from Chapter 5: Overview of distance technologies, <http://fcit.coedu.usf.edu/distance/default.htm>
- Bates, A.W.** (1992). Technology in open learning and distance education. Cited by Bourdeau, J., & Bates, A., Instructional design for distance learning (p. 384). In Dijkstra, S. et al. (Eds.) (1997), *Instructional design: International perspectives. Volume 2: Solving instructional design problems* (pp. 369-97). Mahwah, New Jersey: Lawrence Erlbaum Associates, Inc.
- Battenberg, R.W.** (1971). The Boston Gazette, March 20, 1978. Epistolodidaktika, 1971, 1, pp. 44-45. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 15). San Francisco: Jossey-Bass Publishers.
- Belasen, A.T.** (1998) Managerial competencies. *Management Development Forum*. v. 1, n. 2. Retrieved November 12, 2003, from [http://www.esc.edu/ESOnline/Across\\_ESC/Forumjournal.nsf/wholeshortlinks2/Vol.1+1+-+No.+2+\(98\)](http://www.esc.edu/ESOnline/Across_ESC/Forumjournal.nsf/wholeshortlinks2/Vol.1+1+-+No.+2+(98))
- Berge, Z. and M. Collins.** (1995). *Computer mediated communication: Volume 2 higher education*. Cresskill, New Jersey: Hampton Press, Inc.
- Berge, Z. and M. Collins.** (1995). *Computer mediated communication: Volume 3 distance learning*. Cresskill, New Jersey: Hampton Press, Inc.
- Bratt, J.** (1977). Engelskundervisningens, Framväxt Sverige, Tiden fore 1850. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 15). San Francisco: Jossey-Bass Publishers.
- Bourdeau, J. & Bates, A.** (1997). Instructional design for distance education. In Dijkstra, S. et al. (Eds.) (1997), *Instructional design: International perspectives. Volume 2:*

- Solving instructional design problems* (pp. 369-97). Mahwah, New Jersey: Lawrence Erlbaum Associates, Inc.
- Crowther, D., & Barnett, N.** (1997). *Computer-based learning in political science: a multimedia approach*. Retrieved July 10, 2003, from [www.psa.ac.uk/cps/1997/crow.pdf](http://www.psa.ac.uk/cps/1997/crow.pdf)
- Curzon, A.J.** (1977). Correspondence education in England and in the Netherlands. *Comparative education*. v. 13, n. 3, pp. 249-261.
- Dick, W., & Cary, L.** (1990). *The systematic design of instruction* (3<sup>rd</sup> ed.). Glenview, Illinois: Harper Collins.
- Dijkstra, S. et al.** (Eds.) (1997). *Instructional design: International perspectives. Volume 2: Solving instructional design problems*. Mahwah, New Jersey: Lawrence Erlbaum Associates, Inc.
- Dinsdale, W.A.** (1953). Inception and development of postal tuition. *The Statist*, 1953, pp. 572-575. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 15). San Francisco: Jossey-Bass Publishers.
- Engel, H.A.** (1936). WHA, Wisconsin's pioneer. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 17). San Francisco: Jossey-Bass Publishers.
- Garrison, D.R., & Shale, D.** (1987). Mapping the boundaries of distance education : Problems in defining the field. *The American Journal of Distance Education*. v. 1, n. 1, pp. 7-13.
- Gooler, D.D. & Niemi, J.A.** (Eds.) (1987). *Technologies for learning outside the classroom*. San Francisco: Jossey-Bass.
- Hartnett, R.T., et al.** (1974). *The British Open University in the United States*. Princeton, New Jersey: Educational Technology Systems.
- Hart, A.M.** (1947). Calvert and Hillyer, 1897-1947. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 17). San Francisco: Jossey-Bass Publishers.
- Hawkrige, D.** (2000). Using media and technologies for flexible workplace learning. In Jakupiec, V., & Garrick, J., *Flexible learning, human resource and organizational development*. New York, New York: Routledge.
- Hiltz, S.R.** (1994). *The virtual classroom: Learning without limits via computer networks*. USA: Ablex Publishing Corporation.
- Holmberg, B.** (1983). Guided didactic conversation in distance education. In Sewart,

- D., Keegan, D., & Holmberg, B. (Eds.). *Distance education: International perspectives* (pp. 114-121). New York: St. Martin's Press.
- Holmberg, B.** (1986). Growth and structure in distance education. In Schlosser, L.A. & Simonson, M., *Distance education: Definition and glossary of terms* (Draft) (p. 10). Association for Educational Communications and Technology. Bloomington, Indiana.
- Holmberg, B.** (1989). Growth and structure of distance education. In Mood, T., *Distance education: An annotated bibliography* (p. X). Englewood, Colorado: Libraries Unlimited.
- Jakupec, V., & Garrick, J. (Eds.).** (2000). *Flexible learning, human resource and organizational development*. New York, New York: Routledge.
- Johnson, K.A.** (1987). Interactive video: The present and the promise. In Gooler, D.D. & Niemi, J.A., (Eds.), *Technologies for learning outside the classroom* (pp. 29-40). San Francisco: Jossey-Bass.
- Keegan, D.** (1983). Theories of distance education. In Sewart, D., Keegan, D., & Holmberg, B. (Eds.) (pp. 60-67). *Distance education: International perspectives* (Introduction to section 2.). New York: St. Martin's Press
- Keegan, D.** (1996). *Foundations of distance education* (3<sup>rd</sup> ed.). New York, New York: Routledge.
- Keegan, D. & Rumble, G.** (1982). The DTIs: An appraisal. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 18). San Francisco: Jossey-Bass Publishers.
- King, F., et al.** (2001). Defining distance learning and distance education. *Educational Technology Review*. v.9, n.1. Retrieved June 2, 2003, from <http://www.aace.org/pubs/etr/issue1/king2.cfm>
- Koenig, A.E., & Hill, R.B.** (1967). The farther vision: Educational television today. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 17). San Francisco: Jossey-Bass Publishers.
- Lamb, A.C.** (1992). Chapter 3: Multimedia and the teaching-learning process in higher education. In Albright, M.J., & Graf, D.L., (Eds.), *Teaching in the information age: The role of educational technology* (pp. 33-42). San Francisco, California: Joessy-Bass Inc.
- Lindquist, E., & Vakil, T.** (2003). *Blue print: ADMN 507 – Managing from the middle*. School of Public Administration, University of Victoria. Victoria, British Columbia.

- Luck, A.T.** (1997). *Media selection matrix*. Department of Distance Education, Pennsylvania State University. Retrieved July 2, 2002, from [http://www.cde.psu.edu/de/id&D/media\\_selection\\_matrix.html](http://www.cde.psu.edu/de/id&D/media_selection_matrix.html)
- Markowitz, H.** (1983). Independent study by correspondence in American universities. *Distance Education*. v. 4, n.2, pp.149-170.
- McManus, T.** (1995). *Delivering instruction on the world wide web*. University of Texas. Retrieved June 14, 2002, from <http://www.edb.utexas.edu/coe/depts/ci/it/projects/wbi/wbi.html>
- Minoli, D.** (1996). *Distance learning: Technology and applications*. Norwood, Massachusetts: Artech House, Inc.
- Mood, T.** (1995). *Distance education: An annotated bibliography*. Englewood, Colorado: Libraries Unlimited.
- Moore, M.** (1973). Toward a theory of independent learning and teaching. *Journal of Higher education*. n.44, pp. 661-79.
- Moore, M.** (1977). On a theory of independent study. In Sewart, Keegan & Holmberg, *Distance education: International perspectives* (pp. 68-94). New York: St. Martin's Press.
- Moore, M.** (1987). Print media. In Gooler, D.D. & Niemi, J.A., (Eds.), *Technologies for learning outside the classroom* (pp. 41-50). San Francisco: Jossey-Bass.
- Moore, M.** (1989). Recruiting and retaining adult students in distance education. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p.16). San Francisco: Jossey-Bass Publishers.
- Moore, M.** (1990). Background and overview of contemporary American distance education. In Michael, M. (ed.) *Contemporary issues in American distance education* (pp. xii-xxvi). New York: Pergamon.
- Moore, M.** (1993). Is teaching like flying? A total systems view of distance education. *American Journal of Distance Education*. v.7, n.1, pp. 1-10.
- Nalley, R.** (1995). Designing computer-mediated conferencing into instruction. In Berge, Z. et al. (Eds), *Computer Mediated Communication Volume 2: Higher Education*. Cresskill, New Jersey: Hampton Press, Inc.
- Noffsinger, J.S.** (1926). Correspondence schools, lyceums, chautauquas. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (pp. 15-16). San Francisco: Jossey-Bass Publishers.
- Olcott, D.** (1999). Instructional technologies – Part two: Strategies for instructor success –

- Selecting and using distance education technologies. In Palloff, R.M., & Pratt, K., *Lessons from the cyberspace classroom: The realities of online teaching* (p. 52). San Francisco, California: Jossey-Bass, Inc.
- Ortner & Graff.** (1993). Distance education as two-way communication: Essays in honour of Börje Holmberg. In Mood, T., *Distance education: An annotated bibliography* (p. 23). Englewood, Colorado: Libraries Unlimited.
- Palloff, R.M., & Pratt, K.** (2001). *Lessons from the cyberspace classroom: The realities of online teaching*. The Jossey-Bass higher and adult education series. San Francisco, California: Jossey-Bass Inc.
- Perraton, H.** (1983) A theory for distance education. In Sewart, Keegan, & Holmberg (Eds.), *Distance education: International perspectives* (pp. 34-45). New York: Routledge.
- Peters, O.** (1983). Distance teaching and industrial production: A comparative interpretation in outline. In Sewart, Keegan, & Holmberg (Eds.), *Distance education: International perspectives* (pp. 95-113). New York: Routledge.
- Portway, P. & Lane, C.** (Eds.) (1994). Guide to teleconferencing and distance learning. In Keegan, D., *Foundations of distance education* (3<sup>rd</sup> ed.) (p. 43). New York, New York: Routledge.
- Palloff, R.M., & Pratt, K.** (2001). *Lessons from the cyberspace classroom: The realities of online teaching*. San Francisco, California: Jossey-Bass, Inc.
- Public Broadcasting Service.** (n.d.). PBS Distance Learning: A brief history of distance learning. Retrieved July 3, 2003, from <http://www.pbs.org/als/dlweek/history/>
- Rowntree, D.** (Preparing materials for open, distance and flexible learning: an action guide for teachers and trainers. In *Flexible and distant learning through telematic networks: A case for teaching English, and communication and information technologies*. University of Twente, Faculty of Educational Science and Technology (the Netherlands). Retrieved, June 25, 2003, from [http://www.pit.ktu.lt/HP/coper/kiev.new/cit/ap\\_ch4/act251.htm](http://www.pit.ktu.lt/HP/coper/kiev.new/cit/ap_ch4/act251.htm)
- Rumble, G.** (1986). The planning and management of distance education. In Verduin, J.R. & Clark, T.A., *Distance education: The foundations of effective practice* (p. 16). San Francisco: Jossey-Bass Publishers.
- Rumble, G.** (1991). Book review, Open Learning, February, pp.71-72. In Keegan, D., *Foundations of distance education* (3<sup>rd</sup> ed.) (p. 29). New York, New York: Routledge.
- Schlosser, L.A. & Simonson, M.** (2002). *Distance education: Definition and glossary of*

*Terms* (Draft). Association for Educational Communications and Technology. Bloomington, Indiana.

- Sewart, D., Keegan, D., & Holmberg, B.** (Eds.) (1983). *Distance education: International perspectives*. New York: St. Martin's Press
- Silber, K.** (1981). Some implications of the history of educational technology: We're all in this together. In Thomas, M., & Kobayashi, V. (Eds.), *Pergamon comparative & international education series, volume 4: Educational technology – Its creation, development and cross-cultural transfer*. Elmsford, New York: Pergamon Press.
- Simonson, M.R., Smaldino, S.E., & Albright, M.** (2002). *Teaching and learning at a distance: Foundations of distance education* (2<sup>nd</sup> Edition). United States: Prentice Hall.
- Thomas, M., & Kobayashi, V.** (Eds.) (1987). *Pergamon comparative & international education series, volume 4: Educational technology – Its creation, development and cross-cultural transfer*. Elmsford, New York: Pergamon Press.
- Takemoto, P.A.** (1987). Exploring the educational potential of audio. In Gooler, D.D. & Niemi, J.A., (Eds.), *Technologies for learning outside the classroom* (pp. 19-29). San Francisco: Jossey-Bass.
- Truman, B.** (1995). *Distance education in post secondary institutions and business*. Independent Study in Instructional Technology. University of Florida. Retrieved June 2, 2003, from <http://pegassus.cc.ucf.edu/~btruman/dist-lr.html>
- Truman, B.** (1995). *Digital video*. Independent Study in Instructional Technology. University of Florida. Retrieved June 2, 2003, from <http://pegassus.cc.ucf.edu/~btruman/digital.html>
- U.S. Department of Education.** (1995). The Star Schools program. In Schlosser, L.A. & Simonson, M., *Distance education: Definition and glossary of Terms* (Draft) (P. 5). Association for Educational Communications and Technology. Bloomington, Indiana.
- Verduin, J.R. & Clark, T.A.** (1991). *Distance education: The foundations of effective practice*. San Francisco: Jossey-Bass Publishers.
- Wedemeyer, C.A.** (1962). Report of the Conference on Newer Media in Correspondence Study, Austin, Texas. In Sewart, Keegan & Holmberg, *Distance education: International perspectives* (p. 65). New York: St. Martin's Press
- Wedemeyer, C.A.** (1973). The use of correspondence education for post-secondary education. In Keegan, D. (1996). *Foundations of distance education* (3<sup>rd</sup> ed.) (pp. 58-56). New York, New York: Routledge.

**Wedemeyer, C.A.** (1974). Characteristics of open learning systems. In Sewart, Keegan & Holmberg, *Distance education: International perspectives* (p. 63). New York: St. Martin's Press

**Wedemeyer, C.A.** (1981). Learning at the back-door: In Keegan, D. (1996). *Foundations of distance education* (3<sup>rd</sup> ed.) (p. 62). New York, New York: Routledge.

**Willis, Barry** (2003). *Distance education at a glance. Engineering Outreach, University of Idaho*. Retrieved July 10, 2003, from <http://www.uidaho.edu/eo/distglan.html>

**World Bank** (n.d.). *Distance education technology*. Retrieved June 12, 2003, from <http://www1.worldbank.org/disted/Technology/technology.html>

## APPENDIX A

### Terms Mistaken For Distance Education

*Non-traditional education.* Non-traditional education refers to educational systems that are outside the norm of traditional or conventional education. At the early stages of its development and acceptance, distance education was coined as non-traditional (Moore, 1971, p.661). However, today, given the mainstream nature of distance education, its continued expansion, and emerging studies and research on the quality and effectiveness of distance education in the learning process, non-traditional education can no longer be applied synonymously with distance education.

*Open education.* Open education refers to educational institutions that have a special spirit or particular open administration policies. This philosophy permits students greater degrees of choice in programs, how to study and how they are assessed (Holmberg, 1989). Both face-to-face and distance education practices are carried out in open education. Distance learning, on the other hand, oftentimes is much more closed, having closed views on interpretations of information presented, enrolment procedures, exam cut-offs, etc. Other times it is open. The value of openness is not intrinsic to distance education, rather it is ambivalent (Rumble, 1991, p.72), thus differentiating it from open education.

*Virtual education.* Virtual education is based on (electronically) teaching face-to-face at a distance through such technologies as satellite linked classrooms, compressed video technology, and full bandwidth links (Keegan, 1996, pp.9-10). Distance education is based

on teaching at a distance. Differences between distance education and virtual education are perceived to be time synchronous technology (distance employs asynchronous), and access (distance education pursues unrestricted access – anytime, anyplace) (pp.9-10). Virtual education imposes the same restrictions as conventional education (i.e., must be somewhere at a certain time), economics (virtual education reimposes much of the same economic constraints as does conventional), and didactics (reintroduction of many of the skills of school class or university lecture) (pp.9-10).

*Flexible learning.* Flexible learning relates to the fostering of an educational environment or system that permits students to study according to their preferences: the location they wish, the manner in which they wish, and the materials they wish. It is in essence flexible in all aspects, much like open learning. However, distance education is neither flexible nor inflexible, it is simply a form of education (Keegan, 1996, p.29). Therefore, based on similar grounds as in the case of open learning, flexible learning and distance education are not synonymous.

*Adult education.* In its early phases, distance education was essentially adult education as it was developed with adults in mind. The terms were used interchangeably and quite rightly so. However, for the better part of half a century, distance education has concerned itself with educating both children and adult learners. Adult education, as the title implies, concerns itself solely and exclusively with adult learners.

*Correspondence education.* Correspondence education is “the postal sub-group of the print-based forms of distance education in which compulsory or voluntary meetings are not felt necessary” (Keegan, 1996, p.35).

*Home study.* Home study is a misnomer. A distance student undertaking home study may not in fact ever study from the home or only part of the time. Furthermore, home study generally does not include higher education pursuits, but more often technical or vocational studies (p.35).

*Independent study.* While independent study is frequently used when referring to American university-level distance education (Markowitz, 1983), its weakness is that it indicates an independence from educational institutions, which is not the case in distance education (Keegan, 1996, p.36).

*External studies.* A term used formerly in Australia, exhibiting the same general characteristics of distance education. We now use the term “distance education”(p. 36).

*Distance teaching and distance learning.* Each term as a stand-alone is incomplete since they ignore the role of the other in the education process. Michael Moore (1973) describes distance teaching as “all those teaching methods in which, because of the physical separation of learners and teachers, the interactive (simulation, explanation, questioning, guidance) as well the proactive phase of teaching (selecting objectives, planning curriculum and instructional strategies), is conducted through print, mechanical or electronic devices” (669). Distance learning is referred to at times to focus greater attention on the learner in

the distance education process; removing the overemphasized teacher- or administrative-centredness of distance education. In the United States it is referred to as the use of electronic technologies in distance education: audioconferencing, audiographics, teleconferencing, business television, videoconferencing, two-way interactive video and desktop conferencing (Portaway & Lane, 1994). Keegan limits distance learning to the “learning half of the distance education process” (1996, p.37).

## APPENDIX B

### Summarized Theories of Distance Education

#### *Theory of Independent Study – Charles Wedemeyer*

Charles Wedemery uses ‘independent study’ to describe post-secondary level distance education. Wedemeyer adopts a very learner-centric attitude, which is reflected in his ‘independent study’ definition:

‘Independent learning’ is that learning, that changed behaviour, that results from activities carried on by learners in space and times, learners whose environment is different from that of the school, learners who may be guided by teachers but who are not dependent upon them, learners who accept degrees of freedom and responsibility in initiating and carrying out the activities that lead to the learning. (1973, p.75)

Wedemeyer felt that no one should be excluded from the opportunity to gain an education because of fiscal, geographical, health, or social shortcomings. Furthermore, he believed that conventional education, both at the post-secondary and primary/secondary levels, did not take advantage of modern technologies and employed antiquated learning and teaching concepts.

Acting upon his beliefs, Wedemeyer (1981) set out a conceptual framework of 10 elements that would lead to an improved education system:

1. The system should be capable of operation any place where there are students – or even only one student – whether or not there are teachers at the same place at the same time.
2. The system should place greater responsibility for learning on the student.
3. The system should free faculty members from custodial type duties so that more time can be given to truly educational tasks.
4. The system should offer student and adults wider choices (more opportunities) in courses, formats, and methodologies.
5. The system should use, as appropriate, all the teaching media and methods that have been proved effective.
6. The system should mix and combine media and methods so that each subject or unit within a subject is taught in the best way known.
7. The system should cause the redesign and development of courses to fit into an ‘articulated programme’.
8. The system should preserve and enhance opportunities for adaptation to individual differences.
9. The system should evaluate student achievement simply, not by raising barriers concerned with the place, rate, or method by which he studies or the sequence within which he studies.
10. The system should permit students to start, stop and learn at their own pace.

(p.36)

Wedemeyer believed that there existed ‘space-time barriers’ of education, and the only manner to overcome these was by separating the acts of teaching from learning. This required planning each as a separate activity. He suggested six characteristics of distance

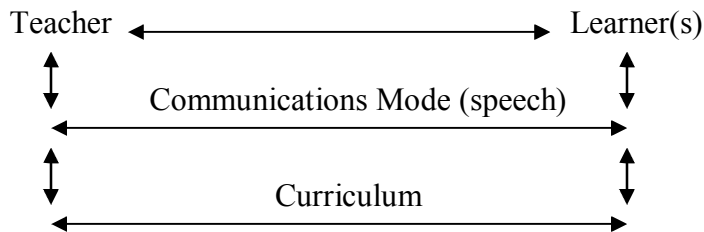
or independent systems, capable of functioning any place there are students regardless of whether or not there are teachers at the same place and at the same time:

1. The student and teacher are separated.
2. The normal processes of teaching and learning are carried on in writing or through some other medium.
3. Teaching is individualized.
4. Learning takes place through the student's activity.
5. Learning is made convenient for the student in his own environment.
6. The learner takes responsibility for his progress, with freedom to start and stop at any time and to pace himself. (Wedemeyer, 1973, p.76)

According to Wedemeyer there are four elements to every teaching-learning situation: a teacher, a learner or learners, a communications system or mode, and something to be taught or learned. Essentially, these elements form a box, a 'classroom-box'.

Figure B.1 The classroom as a teaching-learning situation (Wedemeyer)

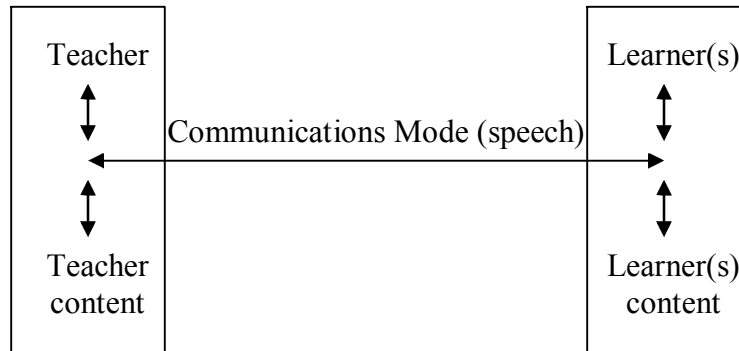
Source: Adapted from Keegan (1996, p.63)



These elements, Wedemeyer argues, if reorganized would accommodate physical space and learner freedom, achieving the teaching-learning system that would work any place, anytime, and for one or more learners.

Figure B.2 A teaching-learning situation to accommodate physical distance (Wedemeyer)

Source: Adapted from Keegan (1996, p.64)



In the end, Wedemeyer felt that not all students would be successful at correspondence education because it is a difficult method of learning. There exist five obstacles to success:

- Developing interest in the task and motivation;
- Readiness for study is a problem in correspondence study witnessed by the; ‘non-start, the early drop-out, the under achiever’;
- Grasping the structure of the subject to be learned at a distance;
- Learning both analytic and instructive thinking; and,
- Evaluating progress in learning (Wedemeyer, 1962, p.14).

However, he did feel that the key to success in distance education was the responsibility of the instructor and the relationship developed between teacher and student.

*On a Theory of Independent Study – Michael Moore*

Moore's theory on distance education, *On a Theory of Independent Study*, was formulated in the 1970's and focuses on the classification of distance education programs.

"Independent study", states Moore, is a generic term that is used to describe a category of educational transactions, classified by their distance, hence the applicability of the term distance education (1977, p.76). His theory examines educational programs through two variables: the distance between instructor and the degree of learner autonomy.

Moore (1977) offers the following definition for distance: "Distance, or Telemathic Teaching is a teaching programme in which, because of the physical separateness of learners and teachers, the interactions between them are conducted through print, mechanical or electronic devices" (p.79). For Moore distance is further sub-defined by two quantifiable variables: "Individualisation" and "Dialogue" (p.76). Individualisation is the extent to which a learner has control over the speed at which the information is received and compelled to respond (i.e., the structure) (p.76). Some programs are highly structured some are not. Dialogue is the provision of two-way communication and the extent to which the media makes it possible or impossible to interact with the instructor (p.76). The degree of two-way communications offered by programs varies among programs. Table B. 1 outlines the types of distance education programs and provides examples.

Table B.1 Types of distance teaching programs (Moore)

Source: Adapted from Sewart, Keegan, &amp; Holmberg (1983, p.76)

	<i>Type</i>	<i>Programme Type</i>	<i>Examples</i>
Most Distance	-D -S	Programmes with no dialogue and no structure	Independent reading-study programmes of the “self-directed kind
	-D +S	Programs with no dialogue and structure	Programmes in which the communication method is radio or t.v.
	+D +S	Programmes with dialogue and structure	Typically programmes using the correspondence method
Least Distance	+D -S	Programmes with dialogue and no structure	E.g., a Rogerian type of tutorial method

Moore has argued that “autonomy is the extent to which the learner in an educational programme is able to determine the selection of objectives, resources and procedures, and the evaluation design” (p.82). In distance education there is a high degree of separation between instructor and student, as such, the student must be accept a high degree of autonomy/responsibility. An autonomous learner works independently, possessing a “self concept that he is self directed” and requires little help from the educator, resisting the teacher direction, and what help is required will be directed towards achieving his learning objectives (p.86). The degrees of autonomy will vary among students, some requiring very little help, some requiring help in “formulating their learning objectives and in identifying sources of information and in measuring objectives. (Schlosser and Simonson, 2002, p.12).

Distance education programs are classified by Moore (1977) as either “autonomous” or learner determined, and “non-autonomous” or teacher determined (p.87).

The degree of autonomy is judged *vis à vis* the answers to 3 questions:

1. Is the selection of learning objectives in the programme that of the learner, or the teacher?

2. Is the selection and use of resource persons, of books, and other media, the sequence and pace of learning experiences, the decision of the teacher, or the learner?
3. Are the decisions about the method for evaluation and criteria to be used made by the learner or the teacher? (p.87)

Table B.2 Types of independent study programmes by variable of learner autonomy (Moore)

Source: Adapted from Keegan (1996, p.73)

<i>Example</i>	<i>Objective Setting</i>	<i>Implementation</i>	<i>Evaluation</i>
1. Private study	A	A	A
2. University of London external degree	A	A	N
3. Learning sports skills	A	N	A
4. Learning car driving	A	N	N
5. Learner controls course and evaluation	N	A	A
6. Learner controls evaluation	N	N	A
7. Many independent study courses	N	A	N
8. Independent study for credit	N	N	N

A = Learner determined (autonomous)

N = Teacher determined (non-autonomous)



conventional education (i.e., teacher lectures students in a group setting) is actually a pre-industrialized form of education. He uses the following headings to compare distance education to the industrialized production of goods: rationalisation, division of labour, mechanisation, assembly line, mass production, preparatory work, planning, organization, scientific control methods, formalisation, standardisation, change of function, objectification, concentration and centralisation. The following is a brief description of how each term associated with industrialisation is applied to distance education.

- *Rationalisation* is the methodical and objective approach of communicating an educator(s)'s knowledge and skills with consistent quality to potentially an infinite number of students via a distance education class (pp.98-99).
- *Division of labour* is the key to the effectiveness of distance education (p.100). It permits the efficient divisions of the activities of teaching: conveying information and of counselling, assessment and recording, into smaller tasks to be taken on by different individuals.
- *Mechanisation* is essential to distance education. Without machines such as “duplicating machines and transport systems are pre-requisites, and later forms... have the additional facilities of modern means of communication and electronic data processing installations”, distance education would not be possible (p.101).
- *Assembly line* is the manner in which distance education is conducted. “In the development of the distance study course the manuscript is passed from one area of responsibility to another and specific changes are made at each stage” (p.102).
- *Mass production* is not compatible with conventional education. Traditional education generally is not oriented towards large scale operations and “[m]ass production is only

possible where there is a sufficiently large ‘mass of consumers’” (p.102). Where as distance education course production represents mass production.

- *Preparatory work* is the decisive phase upon which the success of distance teaching is determined (p.104).
- *Planning* plays an important role in the developmental phase of distance education, as “the contents of correspondence units, from the first to the last, must be determined in detail, adjusted in relation to each other and represented in a pre-determined number of correspondence units” (p.104).
- *Organization* “makes it possible for students to receive exactly pre-determined documents at appointed times, for an appropriate university teacher to be immediately available for each assignment sent in, for consultations to take place at fixed locations at fixed times” (p.105). In large distance teaching establishments organization is easier.
- *Scientific control methods* are applied in distance teaching when experts are commissioned to analyse scientifically the success of courses (p.105-06).
- *Formalisation* occurs in distance education as “all the points in the cycle [of distance study] from student to distance teaching establishment to the academics allocated, must be determined exactly” (p.106).
- *Standardisation* occurs in distance education to a greater degree than conventional education. The format of correspondence units, the stationary for written communication between educator and learner, and the organizational support, each single phase of the teaching process and the academic contents are standardized in distance education (p.107).

- *Change of function* occurs, as the lecturer, once the original role of the provider of knowledge, now is the study unit author and the marker; the role of counsellor is passed on to another position (p.108). The lecturer now becomes the consultant.
- *Objectification* has occurred as most teaching functions are already determined by distance study course and technical means (p.109). There is little subjectivity left in an educator's teaching method with the exception of some communications and consultations with the learner (p.109).
- *Concentration and centralisation* of distance education institutions has occurred as some institutions have grown to cater to very large groups (p.109-10). Furthermore, it is more economically efficient for a fewer number of institutions that provide education to national populations than many smaller institutions (p.110).

Based on the 14 comparisons, Peters concludes that distance teaching is generally determined by the principles of industrialisation, in particular, the principles of rationalisation, division of labour and mass production (p.110). Furthermore, that increasing mechanisation and automation is gradually re-structuring the teaching process (p.110). Peters feels that these changes have resulted in the following:

1. The development of distance study courses is just as important as the preparatory work taking place prior to the production process.
2. The effectiveness of the teaching process is particularly dependent on planning and organization.
3. Courses must be formalized and expectations from students standardized.
4. The teaching process is largely objectified.

5. The function of academics teaching at a distance has changed considerably *vis à vis* university teachers in conventional teaching.
6. Distance study can only be economical with a concentration of the available resources and centralized administration. (pp.100-11)

Peters feels that “within the complex overall distance teaching activity, one area has been exposed to investigation which had regularly been omitted from traditional didactic analysis...[and] new concepts are used here to describe new facts” (p.111). In the closing paragraph Peters states that “the comparative interpretation is not meant to pass judgement on the industrial structures as they apply to distance education” (p.111). However, he follows with this caveat: it is disadvantageous if society does not recognize the developments offered by his theory, as these structural changes in teaching, merit the attention of all (p.111). If they are not aware of these changes and society lags behind the evolving “technological and industrial opportunities” it is likely that malfunctions will occur in academic teaching (p.111).

*Guided Didactic Conversation in Distance Education – Börje Holmberg*

Börje Holmberg’s distance education theory, *Guided Didactic Conversation in Distance Education*, is communication theory applied to distance education. According to Holmberg (1983), education is based upon the communication that occurs between “*educans*” and “*educandus*” and peer group interaction (p.114). He explains that elaborative text processing (i.e., the interaction of the text one reads with one’s prior knowledge), and ‘internalized conversation’ (i.e., the act of internally mulling over something) represent a useful learning strategy that can be extended and applied to teaching strategy (p.114).

Student's attitudes and achievements can be positively influenced through a "guided didactic conversation", essentially inducing students to apply "an appropriate amount of text elaboration to their learning" (pp.114-15) in a cognisant manner.

Holmberg's theory "implies that the character of good distance education resembles that of a guided conversation aiming at learning and the presence of the typical traits of such a conversation facilitates learning" (p.115). The theory is based on 7 postulates:

1. That feelings of personal relation between the teaching and the learning parties promote study pleasure and motivation;
2. That such feelings can be fostered as well-developed self-instructional material and two-way communication at a distance;
3. That intellectual pleasure and study motivation are favourable to the attainment of study goals and the use of proper study processes and method;
4. That the atmosphere, language and conventions of friendly conversation favour feelings of personal relation according to postulate 1;
5. That messages given and received in conversational forms are comparatively easily understood and remembered;
6. That the conversation concept can be successfully translated for use by the media available to distance education;
7. That planning and guiding the work, whether provided by the teaching organization or the student, are necessary for organized study, which is characterized by explicit or implicit goal conceptions. (pp.115-16)

Didactic conversation is formed by the presentation of learning matter, be it printed or in other form, and the two-way communication provoked by assignments. Guided didactic conversation embody specific characteristics. They would be:

- Easily accessible presentations of study matter; clear, somewhat colloquial language, in writing easily readable; moderate density of information.
- Explicit advice and suggestions to the student as to what to do and what to avoid, what to pay particular attention to and consider, with reasons provided.
- Invitations to an exchange of views, to questions, to judgements of what is to be accepted and what is to be rejected.
- Attempts to involve the student emotionally so that he or she takes a personal interest in the subject and its problems.
- Personal style including the use of the personal and possessive pronouns.
- Demarcation of changes of themes through explicit statements, typographical means or, in recorded, spoken communication, through a change of speakers, e.g. male followed by female, or through pauses. (This is a characteristic of guidance rather than of the conversation). (p.117)

Holmberg feels that these characteristics represent the basis for the essential teaching principles of good distance education and the procedures to effectively facilitate learning. Thus, distance learning materials and classes that possess those six traits through proper preparation would be “attractive to students, support study motivation and facilitate learning” (p.117). Holmberg tested his theory and found no conclusive evidence in support of or against it. Although the theory does not offer explanation, he asserts that the theory continues to outline the characteristics favourable to effective distance education.

*A Theory for Distance Education – Hilary Perraton*

Hilary Perraton's *A Theory for Distance Education* is a theory based on existing philosophies of education, and theories of communication or diffusion. The theory is presented in the form of 14 statements or hypotheses. The statements reflect her political and philosophical views of education. Perraton expresses the following opinion concerning education:

Education is to do with power. People without education are at the mercy of those with it, who can use what they know to their advantage and to the disadvantage of the ignorant around them. Education is a means of gaining power, and not simply the right of the better-educated minority. On this showing the case for expanding education is a simple egalitarian one. (Perraton, 1983, p.35)

Her humanitarian sentiments on education lead to the selection of the fields in which the 14 statements and hypotheses are placed: expanding education, dialogues and method.

Expansion of education and the manner in which the expansion occurs are important (p.35).

Dialogue is important as it encourages learning; serves as form for the student to express what has been learned; serves as a checking mechanism to determine what is being learned and what is being taught; and is “a necessary condition of an education which respects the humanity of the student and teacher” (pp.35-36).

*Expanding Education*

1. You can use any medium to teach anything.
2. Distance teaching can break the integuments of fixed staffing ratios which limited the expansion of education when teacher and student had to be in the same place at the same time.
3. There are circumstances under which distance teaching can be cheaper than orthodox education, whether measured in terms of audience reached or of learning.
4. The economies achievable by distance education are a function of the level of education, size of audience, choice of media and sophistication of production.
5. Distance teaching can reach audiences who would not be reached by orthodox means. (pp.36-38).

*Dialogue*

6. It is possible to organize distance teaching in such a way that there is dialogue.
7. Where a tutor meets distance students face-to-face, her role is changed from being a communicator of information to that of a facilitator of learning.
8. Group discussion is an effective method of learning when distance teaching is used to bring relevant information to the group.
9. In most communities there are resources which can be used to support distance learning, to its educational and economic advantage. (pp.38-40)

*Methods*

10. A multi-media programme is likely to be more effective than one which relies on a single medium.
11. A systems approach is helpful in planning distance education.
12. Feedback is a necessary part of a distance-learning system.
13. To be effective, distance-teaching materials should ensure that students undertake frequent and regular activities over and above reading, watching or listening.
14. In choosing between media, the key decision on which the rest depend concerns the use of face-to-face learning. (pp.41-42)

Perraton concludes with a diagrammatic expression of her argument. (Please refer to Sewart, Keegan, & Holmberg, 1983, p.43) In her final thoughts, Perraton questions the usefulness of her approach. She suggests two tests:

First, does it help anyone to see where and how distance teaching might be useful, or useless, for a particular educational job? Second, does the formulation of fourteen

hypotheses suggest ways of testing them which would yield useful knowledge for practical educators? (p.44)

## APPENDIX C

### Selection Questions

(Bååth, 1983; Rowntree, 1994; Olcott, 1999)

- What resources are available for the delivery of the distance education class, both fiscal and technical?
- What is the type of course (i.e., the purpose: for qualifications, hobby, etc.)?
- What are the objectives of the distance education course?
- What is the nature of the subject to be imparted?
- What are the learner characteristics?
- What are the interaction needs?

## **APPENDIX D**

### **ACTIONS Model**

(Bates, 1992)

1. Access: where will students learn: work, home, other?
2. Costs: what are the costs for a particular technology(s)? Including capital, recurrent, fixed and variable?
3. Teaching functions: what are the presentational requirements of the subject?
4. Interaction and user-friendliness: is there a great deal of training required for instructors and learners to use the technology(s)?
5. Organization: are there changes necessary within the organization to facilitate the employment of a particular technology(s)?
6. Novelty: will the trendiness of the technology attract funding, innovation or take-up?
7. Speed: how quickly and easily can changes and updates be made?

**APPENDIX E**

**Pennsylvania State University Media Selection Matrix**

Source: Adapted from Luck (1997).

General Categories Used

Media were first divided into three categories ("low tech," "medium tech," and "high tech"). When using the "Media Selection Matrix," one of these categories should be chosen first, based primarily on learners' anticipated access to and familiarity with distance education technologies.

"Low Tech"	"Medium Tech" (would add...)	"High Tech" (would add...)
<ul style="list-style-type: none"> <li>-Paper (via surface mail)</li> <li>-Video tape</li> <li>-Audio tape</li> <li>-E-mail</li> <li>-LISTSERV postings</li> <li>-Local resources (e.g. libraries, mentors, local faculty, etc.)</li> <li>-Phone</li> </ul>	<ul style="list-style-type: none"> <li>-Audioconferencing</li> <li>-Web-based resources (no plug-ins required)</li> <li>-FTP</li> <li>-Newsgroups</li> <li>-Existing software</li> <li>-Conference call (e.g. Edify)</li> <li>-Fax</li> <li>-Voice mail (e.g. Edify)</li> <li>-Telnet</li> </ul>	<ul style="list-style-type: none"> <li>-2-way videoconferencing</li> <li>-Satellite (1-way videoconf.)</li> <li>-Desktop videoconferencing</li> <li>-Web-based resources (w/plug-ins)</li> <li>-Audiographics</li> <li>-RealAudio</li> <li>-RealVideo</li> <li>-New software (e.g. multimedia apps)</li> <li>-Computer conferencing</li> <li>-Chats</li> <li>-Web-based telephony</li> <li>-Shared workspace</li> <li>-Digital drawing pads</li> <li>-Hand-held scanners</li> </ul>

The Matrix

(Instructional Strategies)	"Low Tech"	"Medium Tech"	"High Tech"
Lecture (including "guest")	<ul style="list-style-type: none"> <li>-Paper</li> <li>-Video tape</li> <li>-Audio tape</li> <li>-E-mail</li> </ul>	<ul style="list-style-type: none"> <li>-Audioconferencing</li> <li>-Web-based resources (no plug-ins required)</li> <li>-FTP</li> </ul>	<ul style="list-style-type: none"> <li>-2-way videoconferencing</li> <li>-Satellite</li> <li>-Web-based</li> </ul>

	-LISTSERV postings	-Newsgroup -Existing software	resources w/plugins -Audiographics -RealAudio -RealVideo -New software -Computer conferencing
Large group discussion (full class)	-LISTSERV postings	--Audioconferencing -Newsgroup	-2-way videoconferencing -Computer conferencing -Audiographics
Small group discussion	-E-mail -Phone -LISTSERV postings	-Audioconferencing -Voice mail	-Chats -Desktop videoconferencing -Computer conferencing -Web-based telephony -Shared workspace
Cooperative learning	-Paper -E-mail -Phone	-Audioconferencing -FTP -Fax -Voice mail	-Desktop videoconferencing -Chats -Shared workspace -Computer conferencing -Web-based telephony -Hand-held scanners
Peer teaching	-E-mail -Phone -LISTSERV postings	-Audioconferencing -Voice mail -Fax -Newsgroup	-Desktop videoconferencing -Chats -Shared workspace -Computer conferencing -Web-based telephony -Hand-held scanners
Brainstorming	-LISTSERV postings -E-mail -Phone	-Audioconferencing -Newsgroup	-Chats -Shared workspace -Computer conferencing -2-way

			videoconferencing -Audiographics
Case study method	-Paper (via surface mail) -E-mail -Video tape (to deliver orig. case) -Audio tape (to deliver orig. case)	-Web-based resources (no plug-ins required) -Audioconferencing -Newsgroup	-Computer conferencing -2-way videoconferencing -Audiographics -New software
Panel discussion	-LISTSERV postings -Video tape (watch only) -Audio tape (listen only)	-Audioconferencing -Newsgroup	-Computer conferencing -2-way videoconferencing -Satellite
Interview	-Local resources -E-mail -LISTSERV postings -Phone	-Audioconferencing -Newsgroup -Fax	-2-way videoconferencing -Desktop videoconferencing -Computer conferencing -Web-based resources w/plug-ins -Chats
Computer-assisted instruction		-Existing software -Web-based resources (no plug-ins required)	-New software -Web-based resources w/plug-ins
Field experiences	-Local resources -Video tape -Audio tape (e.g. concerts)	-Web-based resources (no plug-ins required)	-Satellite -Web-based resources w/plug-ins -RealAudio -RealVideo
Laboratory experiences	-Local resources	-Web-based labs (no plug-ins required) -Existing software	-New software -2-way videoconferencing -Web-based resources w/plug-ins
Role playing	-E-mail -LISTSERV postings	-Audioconferencing -Existing software -Web-based resources (no plug-ins required) -Telnet	-Audioconferencing -Existing software -Web-based resources w/plug-ins
Simulations	-Video tape	-Web-based resources	-New software

		(no plug-ins required) -Existing software	-Web-based resources w/plug-ins
Demonstration	-Audio tape (e.g. language, music) -Video tape -Local resources	-Audioconferencing -Existing software -Web-based resources (no plug-ins required)	-2-way videoconferencing -Satellite (1-way) -Audiographics -New software -Shared workspace
Drill-and-Practice	-Paper -Audio tape (e.g. language courses) -Video tape	-Web-based resources (no plug-ins required) -Existing software -Voice response system	-2-way videoconferencing -Desktop videoconferencing -Web-based resources w/plug-ins -New software -RealAudio
Tutorials (Usually 1-on-1; includes interactions w/people or technologies)	-Local resources -Paper (e.g. branched programmed instruction; correspondence) -E-mail -Phone	-Audioconferencing -Voice mail -Fax -Existing software -Web-based resources (no plug-ins required)	-Desktop videoconferencing -Chats -Shared workspace -Computer conferencing -Web-based telephony -New software
Discovery	-Paper (via surface mail) -Local resources -Video tape -Audio tape	-Web-based resources (no plug-ins required) -Existing software -FTP -Telnet	-Web-based resources w/plug-ins -RealAudio -RealVideo -New software
Studio (e.g. for an art course)	-Local resources		-Shared workspace -Digital drawing pads -Hand-held scanners
Research	-Local resources -E-mail (w/experts) -LISTSERV postings	-Web-based resources (no plug-ins required) -Telnet	-Web-based resources w/plug-ins
Concept Mapping	-Paper	-Web-based resources (no plug-ins required) -Existing software	

## APPENDIX F

### **Internet Research: Methodology, Summary of Findings and Recommendations**

#### *Methodology*

A number of Web Pages for each type of organization (federal, provincial and municipal levels of government; non-profits and aboriginal organizations) were perused, assessing the available information pertaining to the six outlined categories of organizational information: planning, organization, programs, reports, training and development, and financial.

It was beyond the time resources available to sift through the multitude of organizations present on the Internet and discern the contents of each Website for its applicability in developing the database. In all, 41 organizations from the provinces of British Columbia and Ontario were reviewed; roughly ten organizations were reviewed for each organization type. Furthermore, Internet research was entirely limited to Canadian organizations, both for reasons of search efficiency and effectiveness (i.e., the researcher's familiarity with Canadian organizations), and information applicability (i.e., gathering information that is within the Canadian context for added course realism).

At the federal level, research was limited to the Chief Information Officer Branch of the Treasury Board for two reasons. First, to ensure the quantity of and complexity of information to be retrieved is manageable; and, second, the researcher is employed there and subsequently has access to additional information provided via the Intranet and human resource contacts.

Only one entry, not specific to any one Ministry, appears on the Internet research findings matrix for the provincial level. The organizational information available is virtually the same across all Ministries. As such it was considered redundant to list all Ministries examined.

Although not a predetermined category, one crown corporation was included for curiosity's sake. BC Ferries was reviewed.

Most major Canadian cities were reviewed, ten in all, when determining organizational information availability at the city or municipal level.

A total of 19 non-profit organizations were reviewed, covering both large social service agencies that deliver services (e.g., Victoria Cool-Aid Society) and others such as the YMCA or the SPCA. These non-profits are located in British Columbia and Ontario.

Nine aboriginal societies from the provinces British Columbia and Ontario were reviewed.

Before discussing the preliminary Internet research findings specific to each organization type, a brief commentary on the general research findings is warranted.

### *Summary of Findings*

A complete overview of the information available on all 41 organizations reviewed can be found in Appendix G: Internet Research Findings Matrices.

Internet research suggests that the larger the organization the greater the information content provided on their Website. It may be that size of an organization reflects the degree of resources and expertise at their disposal. The richest organizational information is available at the British Columbia provincial level of government with almost all categories,

except demographic data and job descriptions, directly accessible via the Internet.

Information for the Chief Information Officer Branch is comparable, but access to certain pieces of information has yet to be approved or located by human resources. The Websites of both types of non-profit organizations and aboriginal organizations are near barren, offering little to no organizational information except overviews of programs and services, annual reports and financial statements included in the annual reports. Ranked according to the information content of their Websites, the ordering of organization types is as follows: 1. provincial level; 2. federal level; 3. cities; 4.&5. both types of non-profits; and, 6. aboriginal organizations.

Two categories of information difficult to obtain have been identified. They are the categories of organization (chart, number of employees, job description, demographic data and contract agreements) and training and development (in-house training and policies). This information is likely considered internal in nature, and not shared externally, or in some cases, even non-existent. Information publicly available on these two categories is limited to the federal and provincial levels; however, charts are also available for some cities and in a few instances non-profit organizations. Demographic data on employees and job descriptions are not available for any organization type.

### *Recommendations*

There is no organization type that has all the categories of information publicly available via the Internet. It is necessary to determine the appropriate next steps: a) further Internet research to explore other organizations; b) choose from the organizations already reviewed and use the available information; or, c) decide upon an organization(s) for each

organization type and take further steps for acquiring additional information both to fill in the gaps and provide greater details.

The information available for each organization type is substantially incomplete – enough so, that in the opinion of the researcher, the database merits greater information input for it to be an effective teaching tool. Given the Internet research already undertaken and information, available or not available, for each organization type is consistent across the board, further Internet research presents a laborious task that is likely to yield minimal results. Exploiting known contacts and their relationships with particular organizations in order to access more information presents the most efficient and effective means to remedy the current lack of information. In some cases, it may be that the information already available is sufficient; in others the gaps must be filled.

*Federal level: Chief Information Officer Branch (CIOB), Treasury Board Secretariat.*

Potentially all categories of information are available for CIOB either through their Internet Website or their Intranet. There is however 2 points of difficulty in gathering this information. The first point concerns the nature of CIOB itself and the work it does. Many of its employees are on secondment and constantly moving; as such, CIOB human resources does not have information on the number of employees. And, CIOB projects are fixed-length in nature, resulting in the fact that human resources does not have generic job descriptions, only position levels and associated salaries – each group/shop creates its own job descriptions on an as need basis. Human resources is also attempting to gather data surrounding demographics – to date this does not exist. The second point is that

information pertaining to strategic plans, annual reports, performance reviews and budgets may be for internal use only.

A follow-up with human resources should be planned to ascertain their progress in gathering employee demographics and to further discuss the possibilities of gathering at a minimum, generic job descriptions. In terms of seeking approval for the use of internal documentation it is uncertain at this point what the next step is; consultation with this researcher's immediate supervisor is the best first step.

*Provincial level: Ministries in the British Columbia Provincial Government.*

Virtually all categories of information are available on the Websites, except job descriptions and demographic data. Contact should be made with Thea Vakil to discuss potential contacts at the provincial government to acquire both the missing information and further detailed information of the already available information. At the same time it is necessary to decide which Ministry and subsequent area or branch to target and extract applicable information.

*City level.*

All information, less the categories of organization, and training and development, is publicly available on the Internet. Contact should be made with Thea Vakil to discuss potential contacts with a city(ies) to acquire both the missing information and further detailed information of the already available information. At the same time it is necessary to decide which city and subsequent department(s) to target and extract applicable

information. Likely this will be the City of Victoria, due to the location and potential for cooperation based upon an established working-relationship between the School of Public Administration and the City.

*Non-profit organizations.*

These organizations generally provide little more than a list of programs or services and an annual report, which includes a financial statement. The two organizations offering the most information are the Cool-Aid Society and the James Bay Community Project. It is suggested that Thea Vakil, treasurer of the Victoria Cool-Aid Society, should be approached to discuss use of and acquisition of further organizational information. Jim Cutt, former professor at the School of Public Administration and current Board Chair of the Greater Victoria United Way, should be approached to discuss use of and acquisition of further organizational information on the Greater Victoria United Way.

*Aboriginal organizations.* Information available on any of the aboriginal organizations is virtually nil. Thea Vakil should be consulted as to how to better access information for this organization type. Perhaps the School of Public Administration's relationship with Indigenous Studies can be exploited to yield better results. Or, the researcher could contact fellow students, Janet Dunnet or Doug White for help. Janet Dunnet, an employee of CIDA, is currently involved in working with Vancouver Island aboriginal groups for her 598 project. Doug White, an aboriginal himself, works on his band's self-governance in the Nanaimo area.

APPENDIX G

Internet Research Findings Matrices

Provincial and Federal Government Organizations

Organization	Planning		Organization					Programs	Reports		Training and Development		Financial	Source
	Strategic	Service	Chart	# of employees	Job description	Demograph. Data	Agreement	Programs/clients	Annual	Perform.	In-house	Policies	Budgets	Internet
Chief Information Officer Branch, Treasury Board Secretariat	(Uncertain if for internal purposes only)		Yes by branch and working groups	(HR is uncertain if information is available)	Salaries with some generic job descriptions (HR is uncertain if information is available)	HR is gathering data	Yes, part of salary	General, some more detailed than others, depending on working groups	(Uncertain if for internal purposes only)	(Uncertain if for internal purposes only)	Yes	Yes	(Uncertain if for internal purposes only)	Treasury Board and Finance Intranet
British Columbia Provincial Government - Information fairly consistent across Ministries	Fall under Service Plan	Service Plans 2003/04-05/06	Yes	FTE's (Annual Service Plan)	Salaries – <a href="http://www.bcpublcservice.ca/salary_admin/index_BCGEU.html">www.bcpublcservice.ca/salary_admin/index_BCGEU.html</a>		Yes – <a href="http://www.bcpublcservice.ca/la bour/BCGEU/Master/pdfFiles/13MA.pdf">www.bcpublcservice.ca/la bour/BCGEU/Master/pdfFiles/13MA.pdf</a>	Yes	Annual Service Plan Report (2002 - 03)	Performance measurements by branches, programs & supplementary services	<a href="http://www.bcpublcservice.ca/learning/services.htm">www.bcpublcservice.ca/learning/services.htm</a>		By Branch (Annual Service Reports)	<a href="http://www.gov.bc.ca">www.gov.bc.ca</a>
BC Ferries							1998-2003 Collective Agreement	General	Annual Report (2001-02)				Financial statements (Annual Report)	<a href="http://www.bcferries.bc.ca">www.bcferries.bc.ca</a>

## Cities

Organization	Planning		Organization					Programs	Reports		Training and Development		Financial	Source
	Strategic	Service	Chart	# of employees	Job description	Demograph. Data	Agreement	Programs/clients	Annual	Perform.	In-house	Policies	Budgets	Internet
City of Victoria	Corporate Strategic Plan (2000)		General (Annual Report 2002)					By dept.	Annual Report (2002)				2003-07 Revenue & expenditures by dept. (Annual Report)	<a href="http://www.city.victoria.bc.ca">www.city.victoria.bc.ca</a>
City of Vancouver			By dept. includes work plans (very detailed)					By dept.	Annual Report (2002)				Consolidated financial report (Annual report)	<a href="http://www.city.vancouver.bc.ca">www.city.vancouver.bc.ca</a>
City of Edmonton		Corporate Business Plan (2002)	Legislative & Administrative					By dept.		Performance & results (Business Plan)			Fiscal framework (Business Plan)	<a href="http://www.gov.edmonton.ab.ca">www.gov.edmonton.ab.ca</a>
City of Calgary		Some dept.'s have business plans	General (Annual Report)		<i>[Some HR benefits information]</i>			General	Annual Report (2002)	General (Annual Report)			Detailed but high-level (Annual Report)	<a href="http://www.calgary.ca">www.calgary.ca</a>
City of Saskatoon		Corporate Business Plan (2003-05)	City-wide & by dept.					Very general	Annual Report (2002) <i>[Citizens Report 2002]</i>	Performance indicators (2002)			Budget 2003, Operating budget 2003, Financial report 2002	<a href="http://www.city.saskatoon.sk.ca">www.city.saskatoon.sk.ca</a>
City of Winnipeg	<i>[HR Strategic Plan]</i>		Executive & functional					General	Annual Report (2002)				Operating Budget (2003) doesn't open	<a href="http://www.winnipeg.ca/interhom">www.winnipeg.ca/interhom</a>
City of Ottawa	Some for city but not for admin.	2002-2011 Long-Range Financial Plan	Admin structure & some dept.					General		Performance measures (2001)			2002-11 and 2003 detailed budget by depts. & projects	<a href="http://www.city.ottawa.on.ca">www.city.ottawa.on.ca</a>
City of Toronto	Strategic Plan, created 1999-2001							General by dept.		Municipal Performance Measurement			Budget, detailed, by depts. & programs	<a href="http://www.city.toronto.on.ca">www.city.toronto.on.ca</a>
City of St. John's	Strategic Plan (2003-05)	Fiscal & Service Strategy by Dept. (2003)						General	Annual Report (2001)				Budget (2003)	<a href="http://www.stjohns.ca/index.jsp">www.stjohns.ca/index.jsp</a>

City of Charlottetown	Strategic Plan (1999)							General					Financial statement	<a href="http://www.ci-saint-johns">www.ci-saint-johns</a>
-----------------------	--------------------------	--	--	--	--	--	--	---------	--	--	--	--	---------------------	--

*Non-Profit Organizations*

Organization	Planning		Organization					Programs	Reports		Training and Development		Financial	Source
	Strategic	Service	Chart	# of employees	Job description	Demograph. Data	Agreement	Programs/clients	Annual	Perform.	In-house	Policies	Budgets	Internet
Ontario Trillium Foundation								General	Annual Report (2001-02)				Financial statements (2001-02)	<a href="http://www.trilliumfoundation.org">www.trilliumfoundation.org</a>
United Way Canada								General	Annual Report (2002)				Financial statements (2002)	<a href="http://www.unitedway.ca/english">www.unitedway.ca/english</a>
United Way Victoria								General	Annual Report (2002)				Financial statements (Annual Report)	<a href="http://www.unitedwayvictoria.bc.ca">www.unitedwayvictoria.bc.ca</a>
YMCA National Capital Region (Ottawa)								General	Annual Report (2001)					<a href="http://www.edu.com.on.ca/ymca-ywca/">www.edu.com.on.ca/ymca-ywca/</a>
World Wildlife Fund Canada								General	Annual Report (2002)				Financial statements (Annual Report)	<a href="http://www.wwfcanada.org/">www.wwfcanada.org/</a>
British Columbia SPCA	Strategic Plan (2002-06)							General						<a href="http://www.sPCA.bc.ca/">www.sPCA.bc.ca/</a>
Amnesty International Canada								General						<a href="http://www.amnesty.ca">www.amnesty.ca</a>
YMCA (Vancouver)								General	Annual Report (2002)				Financial statement	<a href="http://www.vanymca.org">www.vanymca.org</a>
Victoria Cool-Aid Society				By program				Detailed with # of staff & clients	Annual Report (2002-03)				Some in Annual Report	<a href="http://www.coolaid.org">www.coolaid.org</a>
James Bay Community Project			By program & services					General	Annual Report (2001-02)				Financial statement (Annual Report)	<a href="http://www.jbcP.bc.ca/index.htm">www.jbcP.bc.ca/index.htm</a>
Fernwood Community Centre								Programs & Services					Sponsors and contributors	<a href="http://www.fernwood.ca/index.html">www.fernwood.ca/index.html</a>

Victoria Immigrant & Refugee Centre			By admin. & programs	Related to chart				General	General Report (2001)				Financial statement (General Report)	<a href="http://www.vircs.bc.ca">www.vircs.bc.ca</a>
Intercultural Association								General						<a href="http://www.icavictoria.org">www.icavictoria.org</a>
Recreation Oak Bay								General						<a href="http://Recreation.oakbay.bc.org">Recreation.oakbay.bc.org</a>
Aids Vancouver Island								General						<a href="http://www.avi.org">www.avi.org</a>
Dallas Services (Youth & Family Services)	Trends recognition (Annual Report)							Includes programs & services w/ # of clients	Annual Report (2002-03)	Some (Annual Report)				<a href="http://www.dallassociety.com">www.dallassociety.com</a>
NEED Crisis & Information Line of Greater Victoria			Board of directors & staff (Annual Report)					Yes	Annual Report (2001-02)				Financial Statement (Annual Report)	<a href="http://www.NeedCrisis.bc.ca">www.NeedCrisis.bc.ca</a>
Women's Sexual Assault Centre								Yes						<a href="http://www.vwsac.com">www.vwsac.com</a>
Westhaven Activity Centre								Supports & initiatives						<a href="http://www3.telus.net/westhaven">www3.telus.net/westhaven</a>

*Aboriginal Organizations*

Organization	Planning		Organization					Programs	Reports		Training and Development		Financial	Source
	Strategic	Service	Chart	# of employees	Job description	Demograph. Data	Agreement	Programs/clients	Annual	Perform.	In-house	Policies	Budgets	Internet
Victoria Native Friendship Centre								General						<a href="http://www.vnfc.ca">www.vnfc.ca</a>
CESO Aboriginal Services								Services — Canada & Interantional	Annual Report (2002-03)				Financial statements (Annual Report)	<a href="http://www.ceso-saco.com/aboriginalsvc.htm">www.ceso-saco.com/aboriginalsvc.htm</a>
Odawa Native Friendship Centre								Programs & Services						<a href="http://www.odawa.on.ca">www.odawa.on.ca</a>
Wabano Centre for Aboriginal Health								General						<a href="http://www.wabano.com">www.wabano.com</a>
Kagita Mikam Aboriginal Training & Services								General						<a href="http://www.kaqitamikam.org/kmmain.htm">www.kaqitamikam.org/kmmain.htm</a>
Surrounded by Cedar — Child & Family Services								General						<a href="http://www.surroundedbycedar.com">www.surroundedbycedar.com</a>
Aboriginal Head Start — Association of British Columbia								By differing cities' programs						<a href="http://www.ahsbca.ca">www.ahsbca.ca</a>
Native Court Worker and								General	Annual Report (2002)				Financial statement (Annual Report)	<a href="http://www.vanymca.org">www.vanymca.org</a>
Victoria Cool-Aid Society and Counselling of British Columbia								General	Annual Report (2001)				Financial Statement (Annual Report)	<a href="http://www.nccabc.ca">www.nccabc.ca</a>
Wichiy Friendship Centre								General						<a href="http://www.vallylinks.net/communityservices/aboriginal/wichiy">www.vallylinks.net/communityservices/aboriginal/wichiy</a>

**APPENDIX H****Communications: Letter Requesting Organizational Information**

NAME  
 POSITION  
 ADDRESS

DATE

SUBJECT: Request for organizational information

NAME:

My name is Anthony Giovando and I am a graduate student at the School of Public Administration (SPA), University of Victoria. I am writing on behalf of the School of Public Administration's Director and Associate Professor, Dr. Evert Lindquist and Adjunct Professor, Ms. Thea Vakil, and the Manager of Distance Education Services, Dr. Kate Seaborne. This letter is a request for information essential to the development of an online graduate course in management and leadership, which I am working on as my Admin 598 thesis project.

The classroom-based version of this course employs projects that require teams of students to interact with organizations in the community and conduct organizational analysis. In order to retain the pedagogical value of these exercises, the team experiences and the experiences gained through a hands-on approach, the online course will make use of a database that will house organizational information on existing public sector organizations. This database will support the interactive case studies, exercises and assignments planned for the online course. I am seeking organizational information to populate the database.

NAME OF ORGANIZATION would be an excellent example of a public sector organization to include in the database. SPA is formally requesting your permission to use NAME OF ORGANIZATION in the database. Furthermore, SPA is requesting your assistance in providing organizational information in digital format that is not readily available on the Internet to populate the database, both at the present and possibly in the future for updating purposes. Desired information falls under six categories: Planning, Organization, Programs, Reports, Training and Development and Financial (A complete list of the information for each category is provided at the end of this letter).

Your willingness to provide organizational information necessary to develop the virtual organization would be greatly appreciated. A telephone call can be arranged to discuss the specifics of the requested information, how the information might be assembled and how we might aid you in doing so. To arrange a call, or if you have any questions concerning the requested information, the virtual organization and its uses, or SPA distance education, I can be contacted at (613) 291 2050 or [giovando@uvic.ca](mailto:giovando@uvic.ca) or you may contact Thea Vakil at (250) 721 6442 or [tvakil@uvic.ca](mailto:tvakil@uvic.ca).

Thank you very much for your co-operation and we look forward to response and further correspondence with you regarding the virtual organization database.

Sincerely,  
Anthony Giovando

<b>Organizational Information for the Virtual Organization Database</b>	
<b>Category</b>	<b>Information</b>
<b><i>Planning</i></b>	<ul style="list-style-type: none"> <li>• A strategic plan or in the absence of a strategic plan any strategy, overall policy or set of objectives for the organization</li> <li>• A service plan, or in the absence of a service plan, any plan that sets out in some detail objectives to be achieved together with measures to be used</li> </ul>
<b><i>Organization</i></b>	<ul style="list-style-type: none"> <li>• Organization chart in as much detail as possible</li> <li>• Information about number of employees, if possible broken down by union/non union and types of union</li> <li>• Job descriptions (optional)</li> <li>• Demographic data (optional)</li> <li>• A collective agreement</li> </ul>
<b><i>Programs</i></b>	<ul style="list-style-type: none"> <li>• A listing of all programs with a detailed description of the program, including intended clients or groups of clients</li> </ul>
<b><i>Reports</i></b>	<ul style="list-style-type: none"> <li>• An annual report, or in the absence of an annual report a performance report of any description; and, statistics about programs in terms of inputs/outputs, outcomes and other relevant data that shows how the programs perform</li> </ul>
<b><i>Training</i></b>	<ul style="list-style-type: none"> <li>• Any listing of in house training programs or programs accessed by employees</li> <li>• Any information about developmental policies and activities including information about who pays for training and development</li> </ul>
<b><i>Financial</i></b>	<ul style="list-style-type: none"> <li>• Information about budgets, overall and by responsibility</li> </ul>

**APPENDIX I**

**Organizational Information Retrieved**

The following tables describe the information gathered for each organization to be included in the virtual organization database. All information retrieved is in digital format unless specified otherwise.

Victoria Cool-Aid Society (Not-for-profit, social service type organization)	
Category	Information Retrieved
<i>Planning</i>	<ul style="list-style-type: none"> <li>• Operational Plan with Performance Indicators</li> </ul>
<i>Organization</i>	<ul style="list-style-type: none"> <li>• Organization Chart</li> </ul>
<i>Programs</i>	<ul style="list-style-type: none"> <li>• Program Info – Programs, FTEs, #Clients, Funding Sources</li> </ul>
<i>Organization</i>	<ul style="list-style-type: none"> <li>• Organization Chart</li> </ul>
<i>Reports</i>	<ul style="list-style-type: none"> <li>• Annual Report 2001-02</li> </ul>
<i>Training</i>	
<i>Financial</i>	<ul style="list-style-type: none"> <li>• Described in Annual Report 2001-2002</li> </ul>
<i>Other</i>	Governance: <ul style="list-style-type: none"> <li>• Board Policies</li> <li>• Constitution and Bylaws</li> </ul>

United Way of Victoria (Not-for-profit)	
Category	Information Retrieved
<i>Planning</i>	<ul style="list-style-type: none"> <li>• Business Plan – Progress Report 2003</li> <li>• Strategic Plan 2003</li> </ul>
<i>Organization</i>	<ul style="list-style-type: none"> <li>• Organization Chart - Staff</li> <li>• Job Descriptions: Accounting Assistant 1997, Associate Director 1997, Campaign Marketing Associate 1998, Campaign Secretary 2002, Campaign Associate 2000, Community Programs Coordinator 1997</li> </ul>

	<ul style="list-style-type: none"> <li>• Staff Demographics 2003</li> <li>• Collective Agreement (Expired)</li> </ul>
<i>Programs</i>	<ul style="list-style-type: none"> <li>• A listing of all programs with a detailed description of the program, including intended clients or groups of clients</li> </ul>
<i>Reports</i>	<ul style="list-style-type: none"> <li>• Annual Report 2002</li> <li>• Program Funding Progress Reports</li> </ul>
<i>Training</i>	
<i>Financial</i>	<ul style="list-style-type: none"> <li>• Departmental Budget 2003</li> <li>• Described in Annual Report 2002</li> </ul>

City of Vancouver (City-level government)	
Category	Information Retrieved
<i>Planning</i>	<ul style="list-style-type: none"> <li>• City Plan: Directions for Vancouver</li> </ul>
<i>Organization</i>	<ul style="list-style-type: none"> <li>• Organization charts for all divisions/sectors of City of Vancouver (13 Charts)</li> </ul>
<i>Programs</i>	<ul style="list-style-type: none"> <li>• City Management Program Presentation and Reference Guide (Hard Copy)</li> <li>• Programs – 5 Divisions of City Clerk’s Office</li> <li>• Guide to Municipal Services (Digital and Hard Copies)</li> </ul>
<i>Reports</i>	<ul style="list-style-type: none"> <li>• Annual Report 2002 (Digital and Hard Copies)</li> </ul>
<i>Training</i>	<ul style="list-style-type: none"> <li>• City Learn 2003 Annual Corporate Training Calendar (Hard Copy)</li> </ul>
<i>Financial</i>	<ul style="list-style-type: none"> <li>• Annual Financial Report 2002 (Hard Copy)</li> <li>• Annual Financial Report 2001</li> </ul>
<i>Other</i>	Governance: <ul style="list-style-type: none"> <li>• Mission, Values and Objectives</li> <li>• Vancouver Charter (Index Only) (Hard Copy)</li> <li>• City Council Fact Sheet (Hard Copy)</li> </ul> Other: <ul style="list-style-type: none"> <li>• Parks and Recreation Annual Report 2002 (Hard Copy)</li> <li>• City of Vancouver Newcomers Guide (Digital and Hard Copies)</li> </ul>

Ministry of Health Planning and Ministry of Health Services, Government of British Columbia (Provincial-level government)	
Category	Information Retrieved
<i>Planning</i>	<ul style="list-style-type: none"> <li>• Health Planning Service Plan 2003-06</li> <li>• Health Services Service Plan 2003-06</li> </ul>

	<ul style="list-style-type: none"> <li>• Liberal New Era Document</li> <li>• Health Services Authority Clinical Plan 2002</li> <li>• Northern Health Authority Service Plan 2002</li> <li>• Interior Health Authority Service Plan 2002-05</li> <li>• Vancouver Island Health Authority Service Plan 2002-05</li> <li>• Vancouver Health Authority Service Plan 2002-05</li> <li>• Fraser Health Authority Service Plan 2003-06</li> <li>• Provincial Strategy for end-of-life care in BC</li> <li>• Depression Strategy 2002</li> <li>• Child and Youth Mental Health Plan for BC 2003</li> <li>• Provincial Anxiety Disorders Strategy 2002</li> </ul>
<i>Organization</i>	<ul style="list-style-type: none"> <li>• FTE described in Annual Service Plans and Reports</li> <li>• BCGEU Salary Grid</li> <li>• BCGEU Salary Schedule</li> <li>• BCGEU Salary Schedule (Long Version)</li> <li>• Administrative Guidelines for Salary Grid and Classification</li> <li>• Special Employment Programs</li> </ul>
<i>Programs</i>	<ul style="list-style-type: none"> <li>• Health Planning and Health Services General Responsibilities</li> <li>• The Provincial Health Services Authority – Program Overview</li> <li>• Fair Pharmacare</li> <li>• Home and Community Care Branch - Health Services</li> <li>• Palliative Care Benefits Program - Program Description</li> <li>• Medical Services Plan</li> <li>• Independent Living - Program Guidelines</li> <li>• Ambulance Service</li> <li>• Mental Health</li> <li>• Mental Health and Addictions Reform</li> </ul>
<i>Reports</i>	<ul style="list-style-type: none"> <li>• Health Planning Annual Report 2002-03</li> <li>• Health Services Annual Service Plan Report 2002-03</li> <li>• Performance Measures as described in Service Plans and Annual Report</li> <li>• Provincial Health Authority Performance Agreement 2002-03</li> <li>• Northern Health Authority Performance Agreement 2002-03</li> <li>• Interior Health Authority Performance Agreement 2002-03</li> <li>• Vancouver Island Health Authority Performance Agreement 2002-03</li> <li>• Vancouver Coastal Health Authority Performance Agreement 2002-03</li> <li>• Fraser Health Authority Performance Agreement 2002-03</li> </ul>

	<ul style="list-style-type: none"> <li>• Health Planning Picture of Health Report 2002</li> <li>• New Era for Patient-Centred Health Care</li> <li>• Health Authorities - Restructuring and Roles and Responsibilities</li> <li>• Health Planning Establishing a National Centre for Disease Control in BC</li> <li>• Health Planning The Picture of Health - How we are modernizing BCs health care system 2002</li> <li>• Health Officers Annual Report 2001 - Health and Well-Being of Aboriginal People in British Columbia</li> <li>• Health Goals for BC 1997</li> <li>• Health Goals Regional Index 1999</li> <li>• Policy and Practice - A Report on the Use of BC Health Goals</li> <li>• Report on the Use of Provincial Health Goals in Regional Health Service Plans</li> <li>• Health Services Annual Service Plan Report 2002-03</li> </ul>
<i>Training</i>	<ul style="list-style-type: none"> <li>• BS Public Service Learning Guide</li> <li>• Leading the Way – Leadership Program for Managers</li> <li>• Learning Strategy for BC Public Service</li> <li>• Learning Programs and Services and Funding</li> </ul>
<i>Financial</i>	<ul style="list-style-type: none"> <li>• As described in Annual Reports and Service Plans</li> <li>• Medical Services Financial Plan 2002</li> <li>• Provincial Health Services Authority Financial Statements 2002-03</li> </ul>
<i>Other</i>	<ul style="list-style-type: none"> <li>• Innovation and Awards Programs</li> <li>• Health Services Authority Internal Assurance Charter</li> <li>• Guidelines for Elderly Mental Health Care Planning for Health Authorities</li> <li>• Mental Health Ambulatory Minimum Reporting Requirements</li> </ul>

Chief Information Officer Branch, Treasury Board Secretariat (Federal-level government)	
<i>Category</i>	<i>Information Retrieved</i>
<i>Planning</i>	<ul style="list-style-type: none"> <li>• Business Plan 2003 (Performance Measurement, FTEs, Budget)</li> <li>• Service Improvement Business Line Business Plan</li> <li>• TBS Business Plan 1999-2002</li> <li>• TBS Human Resources Plan Update 2002</li> </ul>

	<ul style="list-style-type: none"> <li>• TBS Human Resources Plan</li> <li>• TBS Official Languages Action Plan</li> <li>• TBS Strategic Planning and Results Framework</li> </ul>
<i>Organization</i>	<ul style="list-style-type: none"> <li>• Organization Chart</li> <li>• CIOB and TBS Organization Chart</li> <li>• Collective Agreements (9 different agreements)</li> <li>• Term Employment Policy</li> <li>• Policy on Staffing of Bilingual Positions</li> <li>• Policy on the Identification of Functions or Positions</li> <li>• Policy Concerning the Language Requirements for Members of the Executive Group</li> <li>• ES – Progression Guidelines</li> <li>• Staffing Delegation Accountability Agreement</li> </ul>
<i>Programs</i>	<ul style="list-style-type: none"> <li>• Overview and Services</li> </ul>
<i>Reports</i>	<ul style="list-style-type: none"> <li>• TBS Plans and Priorities Report 2002-03 Main Estimates</li> <li>• Departmental Staffing Accountability Report</li> </ul>
<i>Training</i>	<ul style="list-style-type: none"> <li>• Continuous Learning Policy</li> <li>• Mentoring Program Phase I</li> <li>• Mentoring Program Phase II</li> <li>• Mentoring Roles and Responsibilities – Employee &amp; Supervisor</li> <li>• Personal Learning Plan Information Document</li> <li>• Personal Learning Plan Report</li> </ul>
<i>Financial</i>	<ul style="list-style-type: none"> <li>• Described in Business Plan 2003, TBS Plans and Priorities</li> </ul>
<i>Other</i>	<p>Flexible Work Arrangements:</p> <ul style="list-style-type: none"> <li>• Work-Life Balance</li> <li>• Flexible Hours of Work</li> <li>• Part-Time Employment</li> <li>• TeleWork Policy</li> <li>• Variable Work Week</li> </ul> <p>Awards and Recognition</p> <ul style="list-style-type: none"> <li>• Awards and Recognition Policy</li> <li>• Awards External</li> <li>• Awards Public Service</li> <li>• Awards</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Employee Assistance Program</li> </ul>

Western Economic Diversification (Federal-level government)	
Category	Information Retrieved
<i>Planning</i>	<ul style="list-style-type: none"> <li>• Plans and Priorities Report 2003-04 Main Estimates</li> </ul>

	<ul style="list-style-type: none"> <li>• Sustainable Development Strategy</li> </ul>
<i>Organization</i>	
<i>Programs</i>	<ul style="list-style-type: none"> <li>• Business Services Networks Program Overviews</li> <li>• Working with the West – 2003 and Beyond</li> <li>• Programs Overview</li> </ul>
<i>Reports</i>	<ul style="list-style-type: none"> <li>• Performance Report 2002</li> <li>• Evaluation of Western Economic Diversification Program 2003</li> <li>• Evaluation of Community Futures Program 2003</li> <li>• Western Economic Partnership Agreements: Final Program Evaluation 2002</li> <li>• Evaluation of Western Economic Diversification and Pacific Fisheries Adjustment 2002</li> <li>• Evaluation of Canada Business Service Centres in Western Canada 2002</li> <li>• Quality Assurance Review Step II: Best Practices 2000</li> <li>• Government On-Line Report 2002</li> <li>• Status Report Official Languages Act</li> </ul>
<i>Training</i>	
<i>Financial</i>	<ul style="list-style-type: none"> <li>• Described in Plans and Priorities 2003-04</li> </ul>

## APPENDIX J

### **Merging the Ministries of Health Planning and Health Services: A Case Study**

Mt. Finlayson is located about thirty minutes north of Victoria. Garry Oak and Arbutus trees grow on its slopes. You have just reached its summit after an hour-long hike from the parking-lot located at its base in Goldstream Provincial Park. Its summit is one of the highest points in Victoria and you can gaze out over the Highland Range and south towards Victoria. It is a beautiful day and you are thankful to have some brief time for reflection.

It all feels like a dream. Just a few months ago you were completing graduate studies at the School of Public Administration, and now you are a consultant with your first big contract. As lead consultant to the Ministries of Health Planning and Health Services for their merger, you are excited about the opportunity to provide input into the merger, but quite daunted by the many challenges in the road ahead. This last week has been a whirlwind introduction to the two ministries and their operations and responsibilities.

You still cannot quite believe that the government is now merging these two recently created ministries; having created them only a few years ago from one common ministry in order to increase efficacy and sustainability of health care services in British Columbia. The Ministries of Health Planning and Health Services, still reeling from these changes, are now expected to be fully merged and operating by the end of the fiscal year 2004-05. Furthermore, budgets are to be cut. Efficiencies have to be found resulting in the reduction of up to 5% of the budget associated with the divisions represented on the Ministerial Merger Team, as well as a reduction of up to 5% of the budget of all other divisions and units. Savings are to come from administration and not from services, and the

overall cut cannot be less than 3%. These savings need to be found in the following fiscal year starting in April 2004.

This past week you met for the first time with each of the four appointed members of the Ministerial Merger Team: Ms. Iris Margarete Focused and Mr. Ben Evolent from Health Planning and Mr. Ian Can and Mrs. Iesha Cathy You from Health Services. The purpose of these informal visits was to get acquainted, ascertain their thoughts on the merger and get a “feel” for them. You will be working with them quite extensively over the next year or so. All are directors of a key division or operational unit within their respective ministry and each brings a unique outlook to the table.

As you reflect upon those visits, you realize that it is going to be a challenge to facilitate an effective working group with these directors, let alone a successful merging of the ministries.

### The Rendezvous

Who: Ms. Iris Margarete Focused

Director, Planning, Policy and Legislation Division

Ministry of Health Planning

When: Tuesday 9:30 a.m.

Where: Ms. I.M. Focused’s office

You arrive at Ms. I.M. Focused’s office a few minutes before the 9:30 a.m. appointment as recommended by her assistant. Apparently Ms. I.M. Focused does not appreciate waiting

on anyone. As you sit and wait for her arrival, the impeccable tidiness of her office is impressive. It speaks to her incredible organization skills and orderliness.

You have heard that Ms. Focused is an up-and-comer in the Ministry. A talented policy analyst on health matters, she has spent five years in the former Ministry of Health before becoming the youngest director, male or female, with the creation of the Ministry of Health Planning and its Planning, Policy and Legislation Division. Despite peers recognising her policy prowess, it is well known that she is difficult to work with. Few assistant directors or assistants last long under her and few colleagues are thrilled at the thought of working with her.

The Planning, Policy and Legislation Division is housed within the core business area of Stewardship and Corporate Management. The division works with the Ministry of Health Services, health authorities and other partners both within and outside government to create policy, legislation, and planned approaches to strengthen the quality and sustainability of health care services at all levels. It also works with partners in the area of human health resource planning to ensure an adequate supply of health care providers, and it has an operating budget of approximately \$7 M and some 50 FTEs. This division has been said to be like working with a group of MBAers. Everyone is uptight and sour, a numbers person, and straight to the point. There is no love lost between this group and their Health Services counterparts. A lot is demanded of these folks, and many burn out. It has been said that this group considers their way the right way, until they prove so otherwise.

Ms. Focused rushes in, firmly shakes your hand, and introduces herself as Ms. Focused. Losing no time, she eyes you up and down and quickly assures you that she is comfortable working with a consultant, even one as young as yourself, as long as you

would be so kind as to refrain from providing recommendations or suggestions on the merger process until asked. Your role, as she sees it, is to support her in leading the Team.

She openly admits her dismay at the merger, feeling that proper policy development in Health requires an arms-length approach from the frontline. For all intents and purposes Health Planning is the helmsperson, and Health Services the oarsmen. She fears that under this merger policy development might be compromised, its impartiality lost by too much emotional input from Health Services in policy development. However, she assures you that she will do all she can to ensure that Health proceeds, as she deems best for British Columbia according to the New Era. Besides, it might offer an opportunity for her to keep a more watchful eye over Health Services. Perhaps then more ambitious targets can be set and the others will fall into line and quicken the pace.

Ms. Focused feels that the one-year time frame is rather quick, but if she is able to prepare a timetable of goals within the next week, outlining actions required for Health Planning and Services, the merger will successfully occur. Ms. Focused will present the timetable at the first meeting of the Ministerial Merger Team despite not being asked to do so. It will be important to make the necessary budgetary and FTE cuts as soon as possible. Best to get it over with quietly and quickly in the night. There is no point in making the worker bees suffer.

Her Blackberry vibrates and she answers. She offers her hand in departure, heading towards the door. As she exits she acknowledges that the merger is going to be a challenge, but feels that it will be a good opportunity and stepping stone towards an Assistant Deputy Minister position. Ms. I.M. Focused bids you farewell and tells you to contact her assistant next week for a copy of the timetable for distribution at the first meeting of the Ministerial Merger Team.

Who: Mr. Ben Evolent

Director, Strategic Change Initiatives Division

Ministry of Health Planning

When: Thursday 12:30 p.m.

Where: The duck pond, Beacon Hill Park

You arrive at the Beacon Hill duck pond half an hour before your meeting with Mr. Ben Evolent. Beacon Hill, a favourite place for relaxing walk-about and picnics for both tourists and Victorians alike. It is home to acres of flowers, trees of many sorts, duck ponds, playgrounds, a petting zoo, soccer fields, ball diamonds, tennis courts and a cricket pitch. From spring until late autumn, flowers and trees form an ocean of colours that dance with the sea breeze. It is a sunny day and you decide that it would be nice to have a little lunch, take in the sites and enjoy the fresh air before your meeting. It will be interesting to see what Mr. Ben Evolent is like in comparison to Ms. Focused. While munching on your Subway sub, you are watching a youthful-looking older gentleman practise Tai Chi by the pond, and as you begin to mentally review what you know about Mr. Evolent and his division.

Ben Evolent has been a public servant for twenty years. He has done stints in Education, Health, and now the Ministry of Health Planning. Mr. Ben Evolent is the director of the Strategic Change Initiative Division. Mr. Evolent is also a motivational speaker for teens and local juvenile soccer coach. Apparently, he is considered a very competent and respected public servant and an all around nice guy. Some mention that he

has a few idiosyncrasies stemming from his younger years living on Salt Spring Island, but they would only elaborate with a smile.

The Strategic Change Initiatives Division is found within the core business area of Stewardship and Corporate Management. It has a budget of approximately \$1.5 M and is home to around 20 FTEs. They oversee projects designed to improve quality, accessibility or efficiency of the health care system, working with provincial ministries, health care providers, administrators and researchers, and provide project management expertise for all areas of the Ministries of Health Planning and health Services. They also develop long term plans for BC's public health care system, and strategic planning for mental health and addictions and home and community care services. For many employees this is a great group with which to work and become a "lifer;" a few do find the tight-knit division a wrong fit and quickly leave. Most within and without the Ministry of Health Services have positive feedback on their dealings with the Division and its director.

You do not notice the Tai Chi practitioner as he approaches, and his calm voice pulls you from your thoughts. The man, with a head of Steve-Martin-like hair, introduces himself as Ben. He motions for you to follow and leads you down under a nearby tree. He promptly sits down cross-legged in the lotus position and offers you the shaded piece of grass next to him.

Ben Evolent insists that you call him by his first name. Ben comments that this is one of his favourite places for lunch hour meditation or for practising Tai Chi. He is concerned that not many public servants are balancing their lives well against the stresses of their jobs. He glances at you and suggests that perhaps some fresh air and sunshine would probably do you some good. All that time spent indoors studying for your Masters in

Public Administration has left you stressed out and out of shape. He lights some sandalwood and begins discussing the work at hand.

Ben feels that if approached with an attitude of gentleness, openness, and teamwork the merger can be successful. The ministry must proceed gently when undertaking the proposed merger since employees are still suffering adjustments from the creation of the two ministries. There is already a lack of love and trust in the work environment, and it will worsen if the merger is not conducted so. Employees need to be empowered and should be aware of all that the Ministerial Merging Team is proposing. This will be a hard pill to swallow for some, but possible, although unlikely in the short timeframe given to us.

The thought of cutting more FTEs and budget concerns Ben. His brow furrows. While necessary, he fears for the future public service. Cutting young people means cutting future leaders from a public service that is already depleted of much corporate knowledge caused by the exodus of older workers through the Liberal Government's early retirement plans. Who will be here to take over in the future?

Ben gets good vibes about the potential for increased organizational effectiveness as a result of the merger. It will provide the opportunity to work closer with his "brothers" in Health Services, in Performance Management & Improvement Division among others. The separateness of the two ministries has given birth to two egos fighting over the same thing – wanting to foster health and wellness. He feels distant from them and feels that, unified, they can better meet the needs of British Columbians.

He feels humbled that he has been appointed to the Team and promises to do his best to co-operate and make the merging process a positive experience for all in the ministries. Ben makes himself available whenever needed and can be called anytime, and says that he is looking forward to tackling this issue with the rest of the team. He gets up,

embraces you good-bye, hands you a fresh stick of incense for later, and returns to the office.

Who: Mr. Ian Can

Director, Strategic Initiatives and Corporate Services Division

Ministry of Health Services

When: Friday 1:30 p.m.

Where: Fort Street Starbucks

On your way from the University of Victoria to meet Mr. I. Can at Starbucks, the bus is delayed by a group of bunnies crossing the Ring Road. The University of Victoria is one of the most scenic campuses imaginable. It is an evergreen campus of tree-lined walkways encompassed by one main roadway, Ring Road, that is home for both students and rabbits. The near tame, fuzzy little critters can be seen munching on grass throughout the campus. As the bus driver waits for the bunnies to scamper across, you gaze off and think over what you know about Mr. I. Can and his group.

Mr. Can is interim director of Strategic Initiatives and Corporate Services Division. The previous director left on maternity leave three months ago. Formerly, the assistant director, Mr. Can has only worked with Health Services for a year and a half. Previously he was a private sector entrepreneur. He is known as a pull-yourself-up-by-the-bootstraps kind of guy, who gets very excited when talking about his work.

The Strategic Initiatives and Corporate Services Division is found within the core business area of Stewardship and Corporate Management. With a budget of roughly \$60 M and some 250 FTEs it performs a variety of functions. It oversees priority initiatives of the

Ministry. The division also provides corporate support services for both health ministries, including information management, human resources and finance. Working with the Performance Management and Improvement Division, it also establishes financial performance standards and monitoring systems for BC's Health Authorities. Lastly, the division provides financing for capital health projects. Apparently the division is constantly looking for ways to improve its operations and services, and employees are never bored. Both ministries acknowledge the strong support and good work that they receive from the Strategic Initiatives and Corporate Services Division.

You arrive ten minutes late for the meeting. Mr. I. Can is already seated trying a new toffee-nut *latte* drink, *grande* size, and reading *Arts and Crafts*. You order a green tea. You apologize for your tardy arrival and begin conversing. Mr. Can immediately comments on your young age and smiles. He feels that it is good that there is a younger member on the Team, one that will perhaps contribute some fresh new ideas. He feels that the trick for your success with this project will be to effectively manage, co-ordinate and communicate with the Team members. He makes himself available to you if you ever wish to discuss the project or any work-related questions or issues you might have. He used to help out new recruits in his private sector days.

Perhaps it is the sugar, but a smile crosses his face and his hands move about as he begins discussing the merger. Mr. Can feels that the merger is an excellent opportunity and can permit the organization to function in a completely new and improved manner. He feels there are overlaps and inefficiencies that can be addressed, in particular, functions that his division currently undertakes on behalf of both ministries. Furthermore, Mr. Can has already identified some ideas that he would like to share at the Team meeting to get input from the other members. He is adamant that the merger should not be treated as a return to

what was, but as an opportunity to change for the better. Such a change will permit the ministry to react to fiscal and public pressures, increasing efficiencies and providing better health care.

Mr. Can admits that these changes can sting, but people will adapt. No one wants to reduce FTEs or budgets, especially him. He has one of the highest numbers of FTEs and larger budgets. When the time comes this will have to be done with tact. But perhaps a shake up is needed. After all, the real world (private sector) is not as cushy as the public sector.

Once the merger is planned, it will be necessary to carefully monitor the processes and changes, adjusting plans and timelines as necessary. Perhaps the process will be developed by the Team as a group, or by only one individual. He looks to you to respond. You offer no comment. Besides you have no idea as of yet how things are going to proceed and what recommendations to make.

He is now becoming a little flushed with excitement and most definitely with caffeine, and he begins to go on about the intricacies of project management, discussing his former days as an entrepreneur and sharing his experiences. Mr. I. Can suggests getting another coffee and discussing this some more with you, but you politely decline. You are due at another meeting shortly.

Who: Mrs. Iesha Christa You

Director, Performance Management and Improvement Division

Ministry of Health Services

When: Friday 3:30 p.m.

Where: Mrs. H. Elp's office

On the way to your last meeting you are beginning to realize that not only will the merger be a difficult process to undertake, but also the Team members themselves might pose considerable challenges. You arrive at Mrs. I.C. You's office and are asked to wait by her assistant. Mrs. I.C. You's meeting with some service delivery partners is going longer than expected.

Mrs. I.C. You has worked in the health field since she was a teenager. She began as a candy striper in high school and then became a registered nurse. Frustrated with the situation of the health industry and its treatment by the government after 10 years as a nurse, she went back to school. Iesha returned to work in the former Ministry of Health with a graduate degree in health policy. She is a vocal advocate of provision of better health care and fostering an environment conducive to effective working relations between government and the health industry. Mrs. You has been the director of Performance Management and Improvement Division since its creation.

Situated within the core business area of Stewardship and Corporate Management, the Performance Management and Improvement Division is the main link between the province and the regional health authorities, which are responsible for the direct delivery of many health services in BC. With a budget of nearly \$25 M and about 100 FTEs, the division works with health authorities, service providers and other partners to implement performance agreements, accountability standards and monitoring systems. The ministry provides funding allocations to health authorities for health service delivery in their local communities. It is common knowledge that, despite the division playing a key role in the ministries, they are doing a lot with limited resources. Yet the work environment is a

positive one and employees strive to maintain a work-life balance. Often employees are disgruntled in how little voice they have in policy direction.

The assistant informs you that I.C. You will now see you. You enter her office and introduce yourself. You cannot help but to notice the piles of documents and file folders scattered around her office, and the long list of divisional performance measurements on the whiteboard behind her desk. She asks you to sit and excuses the delay. Iesha explains that she was just discussing the bi-weekly report and divisional performance numbers with divisional managers. She now has to assemble and compile that information for analysis and evaluation.

Mrs. I.C. You looks at her watch, looks at the photos of what you presume to be her children on the desk, smiles, and goes into discussion about the merger. She is not aware of any performance indicators or measurements from either of the ministries to suggest the current situation is performing inadequately or that the merger will result in increased efficiencies. Iesha wonders why the government cannot simply wait and monitor the situation over the long-term. She fears that the actual merger is just a cash-grab, another way for government to cut dollars, and will damage organizational performance.

It is not understandable why there is need to cut more people and more money without provocation. It is always the same – do more with less. People are still upset at government and the way changes were brought on a few years ago. Public servants deserve better than this. This is going to be some juggling act to make the merger happen successfully without public servants losing complete confidence and performance going down the tube. It will be difficult at best getting all parties to come to agreements on merging processes, cutbacks and the future of a new Ministry of Health. The resulting

informational systems and routines changes and communications needs are staggering. Obviously, a very incremental, monitored merging process will need to be adopted.

Mrs. I.C. You feels that perhaps a key benefit of the merger might be better policy. Health Services is working intimately everyday with many of the providers of health care; they know and understand things that escape the big shots in the Planning, Policy and Legislation Division. Perhaps on paper they are involved in its development, but the reality is that they are passed over. Hopefully the merger will grant them greater input in the policy process and lead to improved ministerial performance. It is time to stop looking at internal turfs and look outside to British Columbians, after all that is who they are all working for.

Looking at her watch, Mrs. You sighs and apologizes for your wait, and now cutting the meeting short, but she must go and pick up her children from day-care. Today is report card pick-up and she wants to see how her children have been evaluated. She has been keeping an eye on her youngest. He may require tutoring this semester.

She suggests that a young person like you, with lots of energy and fresh out of the School of Public Administration will surely have no problem working with the Team on the merger. She looks forward to collaborating with you on this project, and that perhaps you two can get together for a better visit next week after the Monday Team meeting.

### Next Steps

As you begin your descent from the summit of Mt. Finlayson, you contemplate how you will proceed, what the next steps might be, and what you will present at the first

meeting of Ministerial Merging Team. The path is tricky and full of pitfalls, but you continue on. The clock is ticking and there is no time to waste.