Implementing Blended Learning: Policy Implications for Universities

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Abstract

The incorporation of new learning technologies into courses at Canadian universities has been largely undertaken at the initiative of individual instructors, rather than in response to explicit institutional direction or faculty initiatives. This appears to be particularly the case with the migration of individual courses that were formally entirely face-to-face to blended delivery. In this case study, the experience of one university is used to present the types of academic policy and process issues that arose during a pilot project to re-design a single graduate program in order to facilitate the use of blended delivery. Considerations included why and how blended learning was to be used; at what level decisions regarding blended delivery should be made; decision process for individual courses versus entire programs; policy precedents and need for policy modification or new policy. Specific areas examined include course and program approval, resources, and instructor responsibilities and workload. The findings suggest that the work involved in policy updating in a changing environment is important because it surfaces, and opens for review, existing, often taken-for-granted institutional values, norms, and protocols. In some cases, the articulation of these values and norms serves to highlight the importance of respecting them within this new learning context. In others it suggests the need to rethink accepted protocols that may be ill-suited to the educational opportunities that emerging technologies can present.

Introduction

The ongoing incorporation of new learning technologies into university curriculum and programs, like most other significant innovations, is invariably incremental. Instructional innovation is largely undertaken at the initiative of individual instructors in particular departments and programs. This appears to be clearly the most common case in migration of courses formerly delivered in a face-to-face mode to blended delivery. Through their initiatives, individual faculty members map out a broad range of possible new practices. Such practices may or may not prove to be effective; they may support some aspect of the institutional mission or undermine it. They may flourish or wither away.

In this way the transition from individual experimentation to institutionalized practice is generally a gradual, negotiated process of critique and debate in which individual interests and agendas are balanced against other individual, collective and institutional interests – all within the broader context of the evolving mandates of Canadian public universities. Such negotiated responses rarely occur as a single, comprehensive institutional response, but are rather developed “on the ground” as new initiatives bump up against and challenge existing policies and practices.

These situations, we argue, require that administrators (i) understand existing relevant policies (in itself no simple task in large universities); (ii) understand and can articulate the principles on which existing policy is based (again, not always self-evident); and (iii) lead the discussion as to whether existing policies or the way they are interpreted and applied, need to be revised. In this way, new initiatives serve to illuminate and incrementally develop an appropriate institutional response. The case study described in this paper is presented within this context—not as a comprehensive review of policy issues related to the development of blended learning pedagogies, but as a contribution to the dialogue needed to develop such an institutional response.

Defining Blended Learning

Definitions of blended learning vary and, as Graham (2006) has noted, are imprecise and temporary due to the emerging state of the field. Vignare (2007) nevertheless presents a workable definition, one that emerged from the *Sloane-Consortium* research workshops:

> Blended courses integrate online with face-to-face instruction in a planned, pedagogically valuable manner, and do not just combine but trade-off face-to-face time with online activity, or vice versa (p. 38).

This definition is important for our purposes for two primary reasons. In the first instance, the definition recognizes that such combinations may take on a very broad range of forms but emphasizes that such combinations must be pedagogically sound. Second, and in line with other writers (e.g., Haughey, 2006) who emphasize that blended learning needs to be considered more than just an "add-on" to a course, this definition implies a process of significant course re-design during which faculty members consider disciplinary and student needs from a fresh perspective.

Literature Review

Introduction

The literature on policy development related to blended learning can be viewed as falling along a continuum from institutional strategic planning through incentive and reward systems to individual course design. Common threads in the related literature include institutional planning, policies affecting faculty and students, and organizational change. Blustain (2008) indicates that there is much to be gained from policy analysis because of the way that it shows us what is important:

> Policies about uncontroversial things are routinely followed, seldom discussed, and sometimes not even written down. Policies that prove controversial or difficult to implement, on the other hand, throw into relief the clashing interest, the challenges to tradition, and the conflict over new behaviors that get lumped under the generic heading of 'resistance to change.' An uproar or high noncompliance indicates that the policy has hit a nerve. This is especially true in higher education, where institutions are sensitive to, and protective of, their prerogatives, autonomy, and 'traditions.' Of a policy's many functions, therefore, one of the most potent is its role in the change process and policy study can be invaluable in planning and administration. In addition to serving as a barometer of attitudes, an analysis of policy can inform us how well behaviors are (or are not) aligned with new strategies, directions or technologies (p. 29).

As the use of new learning technologies in higher education grows, their potential to influence teaching and learning becomes more apparent. One the one hand, these technologies may enhance and even transform the ways in which we teach and the ways in which our students learn. On the other, adoption of such technologies without clear goals, and careful planning and support runs the risk of cannibalizing or ineffectively using scarce resources, frustrating users, and generating poor learning outcomes**.** Barone (2003) outlines the need for institutions to address the critical relationship between technology use and policy, and recognize that technology decisions are invariably also academic decisions that have an impact on campus practices, policies, and conventions.

Frameworks For Policy Review

Smith, Lewis, and Massey (2000) observe that the issues in education raised by the development of new educational technologies are extraordinarily important and extraordinarily divisive. New technologies necessarily evoke debate and policy decisions around educational methodology, implementation, evaluation and costs. However, "something well beyond pedagogy is at stake: power, control over education, the culture of the university, the privilege of professors, the rights of students as 'consumers'—not only 'how' something is taught, but what, when, why, by whom, and for what purpose" (p.2).

Building upon Morrison's (1999) work in presenting the technical, pedagogical and institutional challenges to effective incorporation of educational technologies in post-secondary education, Smith et al. (2000) developed a helpful categorization for policy review in which the policy implications of online learning are separated into two categories: concerns regarding how to implement educational technologies ("doing things right" or micro issues),

and macro, politically charged questions regarding why and how educational technologies are to be used ("doing the right things"). Both aspects are linked and must be dealt with by policy processes such as strategic planning. Of particular relevance to this study are the questions related to why blended learning might be used ("doing the right things)."

Change in Higher Education

It is widely recognized that the nature of the process of adoption of technology gives raise to idiosyncratic processes and solutions that eventually need to be addressed systematically (Bates, 2000; Garrison and Vaughan, 2008; Owston, Garrison & Cook, 2006; and Rogers, 1995). Hagner and Schneebeck (2001) suggest a model involving three waves of technology diffusion by faculty members. In the first wave, the "entrepreneurs" use new technologies to solve their own instructional challenges, with the result that their solutions tend to be idiosyncratic and not generally "scalable" or portable to other users. This group is similar to Bates' (2000) group of first adopters, aptly named "lone rangers".

The second wave of technology diffusion described by Hagner and Schneebeck engages potential adopters who are committed to quality education but are not convinced that their face-to-face teaching success can be translated into the online environment, lack technical expertise, and are unsure of the costs involved with a shift online. This group therefore requires significant levels of support if they are to incorporate online technologies into their teaching. As institutions widely adopt online learning, and reward structures such as tenure and promotion begin to reflect a new teaching environment, Hagner and Schneebeck see a third wave emerging-one characterized by faculty members who fully integrate technology into their teaching, and see this advancing their professional careers.

At the institutional level, Pospisil & Wilcolcoxin (1998) proposed a conceptual model in which institutional development of online teaching may be seen along a continuum with "anarchic development" at one end (where individuals' interest in and ability to use technology determine what online development occurs); "negotiated development" about the middle (where individual or small group interests significantly influence or determine institutional strategic priorities and instructional design models), and "controlled development" at the opposite end (where strategic priorities are determined at a high level, and central control is exercised over development resources and instructional design models).

Reasons for Moving Online

Graham, Allen and Ure (2005) identify three main reasons for using blended learning: to increase access and flexibility; to improve pedagogy; and/or to improve cost-effectiveness and resource use. Matheos and Curry (2004) employ similar categories to argue for the benefits that online technologies offer to (a) students: access, flexibility, and new, important skills for work in the global networked environment, (b) faculty members: new skills and knowledge to transform teaching, and (c) institutions: increase enrolment, improve teaching and learning outcomes, and more efficient resource use.

King, Nugent, Russell, Eich, and Lacy (2000) built upon the work of Gellman-Danley and Fetzner (1998) and Berge (1998)to suggest a three-tier policy analysis framework, encompassing management and organization, faculty, and students. A number of components are identified within each tier. For example, the management and organizational policy tier includes institutional priorities, course selection and approval, resources and infrastructure, and intellectual property.

Issues in the faculty tier have frequently been noted in the literature. Rockwell, Schauer, Fitz & Marx (1999) observe that perceived or actual increases in faculty workloads are a disincentive to the development of online programming, and Arniel and Orey (2007) list time issues as a common cause of faculty resistance: time requirements for course development, course delivery and faculty-student interaction as well as for training and development of technological skills; and opportunity costs such as time taken from research. Varvel, Montague and Estabrook (2007) note that existing policy relating to teaching workload, such as average number of students in class and frequency of class meetings, often fails to reflect the new reality of online learning, and as a result, faculty workload in online courses can be one of the most contentious internal policy issues. The work of Wellman and Ehrlich (2003) and Welch (2007) in development of models to determine equivalency in online courses, suggests that the widely accepted and convenient standard of time in class as the unit of measurement-the Carnegie Unit-is of little value as teaching and learning move online. Welch recommended shifting away from time as a unit of measurement to a model that focused on outcomes such as learner achievement.

Policy relating to students comprises the third tier of analysis. Of particular relevance are policies relating to identifying and addressing access and support. Time, geography, disability, learning style, and access to and

comfort with technology are highly individual variables that may present either barriers or attractions for online and blended learning.

Institutional Context

The programs and policies used as illustrations in this case study are those of the University of Manitoba (UM), a large, comprehensive public university offering medical, doctoral, and professional degree programs. It is the oldest university in western Canada, with two major campuses and 22 faculties and schools, and an enrolment of some 26,000 students. Its Faculty of Education offers a two-year after-degree Bachelor of Education program and Masters and Doctoral programs.

Graduate programming in the Faculty has been primarily focused on a face-to-face delivery model, with online resources and pedagogies increasingly used to supplement or enhance these courses. While there have been a variety of innovations in face-to-face programming to increase access and flexibility (e.g., summer offerings, compressed weekend courses, and off-campus cohorts), and a number of online courses are offered, only a few courses have been developed that fully integrated online and face-to-face delivery and these have generally been the results of the efforts of individual faculty members.

Attempting to develop the capacity to develop a more comprehensive and systematic orientation to blended learning, faculty members in the Adult and Post-Secondary Education (A&PSE) graduate specialization undertook a series of self-study and action research projects beginning in 2007. Over two years, institutional leadership in support of these A&PSE initiatives was provided by the Vice-President (Academic)'s Office, which offered a small funding envelope for blended learning research and projects. Three projects were undertaken: a graduate course re-design project, a project to develop strategies and resources for blended teaching and learning within the A&PSE program, and this policy research case study.

Conceptual Framework and Methodology

As has been noted elsewhere (Barone, 2003; Blustain, 2007; Owston, Garrison, & Cook, 2006; Wallace, 2007), the development of online and blended course delivery in universities has given rise to the need to re-asses the adequacy and appropriateness of a broad range of existing policies and administrative practices and protocols– some involving relatively simple rewording tasks and others involving a much more extensive rethinking of institutional purposes and priorities and changes to existing collective bargaining agreements. Consistent with our understanding that institutional change of this nature within universities usually occurs incrementally, through a generally lengthy process of deliberation and negotiation, this case-study project did not attempt to address the full range of policy issues associated with the integration of blended learning strategies as a central aspect of university programming. Instead, focusing on macro issues and policy gaps, we situated the major policy issues that surfaced through our research into King et al. (2000)'s three categories: (a) management and organizational: goals, course selection and course approval, resources, and intellectual property; (b) faculty/academic: responsibilities and workload, and (c) student access and support.

Data and information for this case study were drawn from four sources: (i) a review of the literature and university websites to identify common policy issues relating to blended learning; (ii) an analysis of existing institutional policy documents from the University of Manitoba; (iii) interviews with faculty members and university administrators; and, (iv) several project meetings held by members of the Adult and Post Secondary faculty group.

A set of policy areas was identified in discussion within the research team and with faculty members and administrators. Relevant policy documents were located and reviewed in an effort to determine how decisions had been made in the past regarding the delivery mode of courses and programs. We presented our findings from the review of policy to faculty members in the department and academic administrators. We then asked their views as to how the process might unfold for blended delivery of the graduate program, and what were the important policy areas and directions.

Findings

The following areas below were identified as policy challenges:

Management and organizational:
a) Determining the fit of blended learning within the stated goals and priorities of the institution, faculty, and department.
b) Establishing approval processes and criteria regarding moving a course/program to blended delivery.
c) Support for development and delivery of blended learning.
d) Establishing appropriate ownership of intellectual property.

Faculty/academic:
a) Establishing criteria to assess parity/equivalency of blended courses.
b) Establishing criteria to determine faculty workload for blended course development and teaching.

Students:
a) Identifying and addressing access issues.
b) Orienting and supporting students in using technology in blended courses.

Determining the Fit of Blended Learning within Stated Goals and Priorities

The University of Manitoba's *Strategic Planning Framework* (2009) outlines four priorities: academic enhancement and innovation, outstanding student experience, Aboriginal achievement, and outstanding employer. The *Framework* is described as a call to action rather than a prescriptive approach to planning, and while the priorities do not speak directly to online or blended learning they do open the door to innovations in teaching and learning, particularly as these relate to student success.

Relevant goal statements from the Faculty of Education are:

- To ensure its programs, activities and practices are appropriate for and are accessible to the widest variety of students, reflecting the diversity of Manitoba's population.
- To offer rigorous but flexible graduate programs in educational studies.

The Faculty's Adult and Post Secondary Education graduate program brochure explicitly states a commitment to e-learning:

> We embrace the trend to use information and communication technologies for removing distance as a barrier to education, and making learning more accessible. We currently offer several of our courses online and in distributed modalities.Our course, *Program Planning in Adult Education,* won the WebCT 2001 International Exemplary Award for exemplary use of technology to deliver a distance education course while maintaining strong academic rigor and content robustness.

The University's strategic plan speaks to the broad goals of innovation and student success, but does not identify online or blended learning as an institutional priority. Similarly, the Faculty of Education's mission statement may be interpreted as being permissive rather than explicitly supportive of online or blended learning. Discussion with some faculty members suggested that as a professional school, the Faculty's primary focus is pre-service teacher education, and with this came an emphasis on face-to-face teaching and learning. Therefore, while the University and the Faculty have accessibility goals, online or blended learning is not viewed the primary means by which these goals are realized. Nonetheless, access, pedagogy, and cost-effectiveness have led to a variety of programmatic initiatives in the Faculty, and a blended learning approach to both course or complete program delivery would seem to be consistent with institutional goals and ambitions.

Approval Processes

We began with an examination of the existing institutional policies and processes governing approval of courses or programs. We confirmed that there is a well-established and comprehensive process for approval of the *curriculum* of new or revised courses and programs, which balances the individual autonomy of instructors with the interests of the institution (and, in addition in the case of new programs, the strategic interests of the provincial government). This process involves approval at the department, faculty and senate levels.

As is the case at most Canadian universities, the senate is the body with "general charge of all matters of an academic character" and has among its powers to "regulate instruction and determine the methods and limits of instruction" (*University of Manitoba Act*, Section 34.1). However, we found that while senate actively exercises this authority with regard to new and modified course and program *content*, it has not done so with respect to methods of instructionor *modes of delivery*. Over the past 25 years, there has been considerable expansion of programs offered fully or in part via distance and online methods, primarily at the undergraduate or post-baccalaureate level and this expansion has taken place without Senate involvement. Four programs have been moved either fully or partially to distance delivery on the basis of a faculty-based rather than a senate process [B.A. (General), Bachelor of Social Work, Bachelor of Nursing (Post-R.N.), and Post Baccalaureate Diploma in Education]. With the exception of a senate policy passed in the early 1980s to lift the restriction on the number of correspondence courses that could be taken in a Bachelor of Arts degree, we did not find evidence in senate documents regarding approval by that body of the delivery method of a course or program.

Deans and department heads interviewed confirmed the operational evidence that decisions regarding the delivery method of senate-approved course curricula currently lies with the collegial decision-making structures of faculties and departments. For example, none of the decisions to offer courses online, in modular or compressed format, or off-campus have been seen to require senate approval. This is the case for both the undergraduate and graduate levels. In the Faculty of Education, while proposals for graduate programs or courses may originate with individual faculty members or program area groups, the formal approval process flows through the Faculty of Education and Faculty of Graduate Studies processes before being forwarded to senate.

Further evidence is provided by the protocols followed for selection, development, and delivery of online courses offered through Extended Education, where courses routinely have no face-to-face contact. There are established polices and processes for the development of online courses offered through Extended Education. These involve approval by the department head (and in some cases, department curriculum committee) on behalf of department council of the course selected for development, content specialist, and the online course curriculum, learning outcomes and activities, and assessment. The process involves an instructional designer, an incentive in the form of a stipend or course release for the content specialist and an incentive in the form of tuition sharing for the department and faculty. There is written clarity regarding ownership of intellectual property, processes for copyright clearance, and support to the content specialist for media acquisition and production, technical assistance and other aspects of course development, production and delivery.

Departments may choose to work with Extended Education in development and delivery of online or blended courses but they are not compelled to do so. There are therefore two avenues via which online and blended courses may be developed. Both involve departments and faculties, but in the case of courses not brought through Extended Education, there did not appear to be an institution-wide process for re-design of courses or programs for online/blended delivery.

Learning technologies are used in a broad range of ways in graduate courses in the Faculty of Education, and considerable funds have been devoted to developing physical and human capacities in this area. However, these initiatives tended either to be in the form of one or two completely online courses or to be what Graham (2006, p. 13) refers to as "enhancing blends" where online strategies and resources are incorporated into a face-to-face course offering while still conforming to the existing expectations and protocols associated with traditional face-to-face delivery (e.g., 39 contact hours per semester, and weekly face-to-face office hours).

In recent years, decisions have been made regarding the development of online versions of existing courses, and the approval of blended courses with reduced face-to-face components. While there has been some variation in the way in which specific initiatives have been handled, it appears that there is some consistency of process. While a proposal may have originated with an individual faculty member, the normal practice was for these proposals to be discussed in a curriculum group meeting. When there was support and past precedent for the initiative, it usually went forward with department head approval. When there was no precedent, the issue would more likely be brought to the department council for consideration, and in the case of precedent-setting decisions such as a new delivery format which was seen to have faculty-wide implications, it might also be either referred to faculty council in advance, or after-the-fact as a concern of a council member. Initial responses to blended learning tended either to involve status quo (i.e., approved so long as course could be delivered with existing resources, including teaching loads and class sizes) or special project status (involving short term infusions of resources to support course development or delivery). While these had been effective temporary strategies for working within existing protocols, they did not provide the basis for a fully integrated approach to blended learning, and there was agreement that a new set of more appropriate protocols was required.

At discussions with faculty members and the department head, there was general agreement that moving a course, let alone a program, to blended format is both academic decision and a resource decision and therefore the

approval of the department and head, faculty council and dean should be required.

Instances in which online components such as discussion groups or links to resources were added to courses without reducing class contact hours (an 'enhanced', rather than an 'integrated' approach), were seen as redefining neither the expectation of students nor instructor, and without significant resource implications. These decisions were therefore seen as more in the realm of the instructor. While consultation with the department head was a general expectation in the Faculty of Education, this was not interpreted as a required approval process. (In some other faculties, it is the practice for the department head to approve course outlines and evaluation processes. However, this is not institutional policy nor universal practice.)

Criteria for Course Selection and Approval

Although not stated as policy, our discussions suggested that the foundational university principle of academic freedom would require that institutional approval for blended course delivery would be given (a) unless the proposal violated some other significant area/department priority (i.e. a *bias of approval* rather than denial), and provided the course met the criteria of: (i) equivalency, (ii) student access to be facilitated or at least not negatively affected, (iii) compatibility with the stated goals of the program, and, (iv) no added resource implications which have not been approved in advance.

As discussed earlier, the three main goals of a move to blended teaching and learning usually are to increase access and flexibility, improve pedagogy and learning outcomes, and/or improve use of available resources. Our discussions suggested that the decision for the pilot had been based upon the goal of improved pedagogy, with improved flexibility and skill development of students as riders. However, as the reasons for supporting the move to blended learning were mixed, and since it would be rare that all three goals could be met, the discussion sometimes pitted one goal against another. Goals may have been related but may nevertheless have pointed to different solutions. For example, if access was the primary goal, online delivery generally provides greater flexibility of time/place of learning than blended learning. We learned that such distinctions are important because when positions are articulated using only one of these rationales, they may leave unexamined competing and sometimes incompatible agendas related to the other two sets of considerations. Furthermore, while individual faculty members and program areas may have some autonomy in establishing their own course and program delivery modes, the degree to which the justification for these modes articulates with Faculty and institutional mandates and strategic priorities-as well as their own-becomes an important 'framing' policy consideration.

Given that this case study involved a graduate program, a question was raised about the distinction between course and program decision-making. Areas of specialization within the program should be well integrated. This raises the important question as to whether decisions at the course level have also to be considered at the program level.In this case, the department agreed that they needed to develop criteria as to what would comprise a blended *program* (e.g., minimum number of blended courses, whether these were required or elective courses). Although criteria have not been finalized, criteria discussed included pedagogy (degree to which course goals and outcomes can be best facilitated with blended learning), students (choosing courses based upon the need for flexibility in time, place or pace of learning; potential to reach more learners and new constituencies; student's access to technology), using and building capacity (choosing courses based upon instructors' strengths and interests), and cost-effectiveness (choosing courses that use available resources).

There was also agreement that some level of coherence regarding blended delivery needs to come from a balance of collegial decision making within the department, and individual decisions by faculty members regarding their assigned courses.

Support for Development and Delivery of Blended Learning

In the course of our discussions, it became clear that any move to blended learning would be likely to present resource implications related to new or additional resources for staffing, technology, and training and support. The group suggested that such courses should become part of the resource allocation process involving the department and department head, faculty council and dean. Criteria and policies through which that support would be made accessible also need to be developed. Resource issues that surfaced include:

(a) *Faculty resources*: Initiatives should not be allowed to get ahead of, or drive, faculty budgets and the dean therefore needs to be involved in any proposal that has resource implications for the faculty. Individuals or curriculum groups cannot design courses or programs with associated resource issues and then attempt to impose them on the dean. Conversely, if the dean or faculty seeks to promote blended learning initiatives, they need to be prepared to resource them.

At the moment, there is little consistency in practice in the Faculty, and there are at least three different models at work (i) individual initiatives, often without any formal approval or 'quality control process' and without any resource support, (ii) Faculty initiatives in which an instructor is provided release time for the course, and (iii) initiatives in which the Faculty and Extended Education collaborate to develop an online/blended course. In this latter case, the instructor receives course development expertise and resources from Extended Education as well as a stipend from that unit.

(b) *Infrastructure*: Equipment, facilities, and instructor support have also been handled only on a pilot basis, with some resource needs being met through individual funding applications.

(c) *Resource issues for students*: At the course level, this support includes access to a well-equipped computer and high-speed internet access as well as technical support. Resources and accessibility issues need to be investigated for all students, but with particular attention to implications for rural, northern, and First Nations communities.

It is clear that we need resource policies for online/blended course development and delivery. These might be in the form of program development funds, with funding adjudicated according to criteria relating to access, quality, costs, and priorities of the curriculum group and faculty. If blended learning initiatives are to succeed, let alone expand, we need to move beyond pilot projects to a systematic, resourced academic plan.

Ownership of Materials

Triggs (2005) pointed out that academics have long been exempted from the experience in the wider world in which copyright for works produced during the course of employment typically resides with the employer. Over the past decade, copyright for online course materials has increasingly becoming vested in collective agreements between faculty associations and Canadian universities. This is also the case at the UM, where faculty members own copyright to works created in the course of performing their regular university duties. In the words of the current collective agreement, ownership extends to "lectures, course notes, laboratory notes, or laboratory manuals, regardless of format or method of delivery, individual course websites created by a member, examinations created by a member, and other works prepared by a member and intended for use only by the students registered in the member's course" and such ownership is notwithstanding that the work was produced wholly or partly in the course of regular university duties and/or making use of university resources (University of Manitoba, 2009, p.23).

An exception to faculty copyright ownership is courses developed under separate, compensated appointments such as those prepared for Extended Education online or blended courses. We therefore have two models of copyright ownership operating in the blended learning project: (a) assigned courses developed by faculty members without substantial additional resources provided by the institution, and to which the faculty members hold copyright, and (b) courses developed under separate arrangements such as with Extended Education in which additional compensation is provided and copyright is negotiated. Copyright in the latter case may be held by the university, jointly held by the faculty member and university, or remain with the faculty member but with negotiated institutional use of the materials. The movement toward Open Education Resources, in which the work is made freely available through initiatives such as a Creative Commons license represents a third option being explored but it was not used in the courses in the case study.

Criteria to Assess Equivalency

The issues of standards of equivalency for blended courses and defining workload are clearly related. Within the Faculty of Education there is a well-accepted norm that three-credit hour courses involve 36-39 hours of class time/face-to-face student-instructor interaction-the Carnegie Unit. While this is only one of several components of the institutional construction of an adequately rigorous course, it is one challenged by blended learning.

Our consultations strongly suggested that the norm of the Carnegie unit is at the heart of perceived issues of equity and quality in blended courses. Yet any developments with regard to blended learning require reframing this 'sacred cow' to facilitate course approval, establish equivalency, and assign workloads. Two models currently operating at our university that may prove useful are (a) graduate courses in which laboratory work and individual work with a graduate advisor provide a much more flexible orientation to contact hours, and (b) the process of assessing equivalency of online courses offered through Extended Education.

Criteria to Determine Faculty Workload

This issue initially arose when an instructor requested department head approval for a blended course involving a

reduction of 50% in the face-to-face contact time, offset by a series of required online instructor- and peer-moderated activities. In keeping with the tentative, instructor-initiated manner in which such initiatives have been introduced, the *de facto* approach to workload has generally been that of 'cost-neutrality'-support for the development of online/blended courses had generally been on the basis that these take place within the existing workload arrangements. This has meant that not only has there not been an incentive to move to blended learning, but the department or program area must support such initiatives using existing resources.

Faculty workload and the assignment of workload are issues covered in the *University of Manitoba Faculty Association Collective Agreement* (2009). The Agreement states, that faculty members' duties are determined by the unit dean in consultation with the faculty member (Article 19.A.2.4). In elaborating on teaching duties, the Agreement states that, "Faculty members have the right and obligation to develop and maintain their scholarly competence and effectiveness as teachers within their area of expertise; conscientiously to prepare and organize their subject matter; to revise the subject matter on a regular basis as appropriate to the courses that they teach" (Article 19.A.2.4.1.1).

The combined effect of these articles is to place course development/revision within a faculty member's normal workload, and the specifics of that workload to be assigned by the unit dean. Likewise, the development of the technical skills necessary to effectively develop and deliver online courses becomes an optional dimension of effective teaching. There is no requirement that faculty members develop online or blended versions of their courses, and Article 19.A.2.4.1.2 requires that, "… members must consent to the technology used in teaching a course dependent on information technologies. This consent will not be unreasonably withheld."

As previously mentioned, policies that focus on mandating "class time" or contact hours are problematic to the development of blended learning. The time that instructors spend in their classes is ensconced in academic policy and collective agreements (e.g., 150 minutes per week), and conditions under which instructors may cancel a class are also outlined. If blended learning is to be supported, policies will need to be updated to provide the criteria and process whereby classroom contact hours may be reduced when some teaching components are moved online. Revising such polices may also prove to be more difficult than it might seem. While quantifying the time that instructors spend in class is relatively easy, negotiating an acceptable figure for online or blended courses, along with other often contentious issues relating to faculty workload in online courses, will be more of a challenge.

In summary, there is currently little institutional incentive nor reward for faculty members to move courses to a blended format, concerns raised by faculty members in the case study mirrored those raised in the literature: lack of incentive or reward or recognition as well as disincentives related to opportunity costs of time to master technology and incorporate best pedagogical practice.

Student Access and Support Issues

As previously noted, the major focus of examination in the case study was policy rather than course design, pedagogy or technology per se. Nevertheless, a number of questions arose relating to student access to technology and support, and were seen as requiring inclusion in future policy and resource planning: Will all students in the course have the required connectivity? If so, what are the cost implications and who will bear them? Will moving to blended delivery advantage some students over others (e.g., financial, geographic, learning style, familiarity with technology)? How will students be oriented to both the pedagogical and technical aspects of blended courses? What ongoing technical support will be required and how will it be resourced?

Discussion

The explorations with faculty members and academic administrators undertaken in this case study were among the first attempts at our institution to identify the academic policy and process issues relating to blended courses. As adoption of blended learning at our institution is in early stages, it was perhaps predictable that many of the issues raised had not been previously extensively examined, let alone resolved. Many of the issues raised reflected key policy areas presented in the literature on blended learning, including the need to clearly identify the goals of a move to blended learning, develop a resource and implementation plan, and modify key policies and develop new ones, particularly in the areas of course approval and equivalency, faculty workload, and resources.

Our findings suggest that the work involved in policy updating can be challenging but it important because it opens for review often taken-for-granted institutional values, norms, and protocols. In some cases, the articulation of these values and norms serves to highlight the importance of respecting them within this new learning context. In others, it suggests the need to rethink and reformulate accepted protocols that may be ill-fitted to take advantage of the educational opportunities presented by emerging technologies.

A prime example of the need to re-formulate accepted protocol is the Carnegie unit. We suggest that it is at the heart of perceived issues of equity and quality in blended courses, and we therefore need to shift beyond time as a unit of measurement for purposes of assigning faculty workload and evaluating course equivalence. In keeping with the recommendations of Welch (2007) and Owston, Garrison and Cook (2006), we need to develop other criteria relating to curriculum, learning activities, assessments, and learning outcomes.

Online and blended delivery modalities also bring with them different demands of instructors. However, as we have discussed, the early institutional response to blended learning at our institution involved proceeding with initiatives only if they could be delivered with existing resources or were assigned "special project" status. We need to more fully consider the actual time demands of blended teaching in relation to institutional resources, reward structures, and priorities.

Due to the absence of an institutional plan and the incremental nature of adoption of learning technology, we observed idiosyncratic solutions identified in the literature as typical of the early stages of technology diffusion. In terms of the continuum of institutional development proposed byPospisil and Wilcolcoxin (1998), much of what we observed was at the anarchic development or negotiated development points. Our interest, however, was less in locating the University of Manitoba on this continuum, but rather in offering additional evidence that innovation typically, and likely by necessity, begins at an initial stage of individual experimentation. In order to become more widely adopted, such innovation requires systems and, through a process of exploration and negotiation (and sometimes grievance), becomes institutionally embedded with a well-established, complete set of policies and protocols to regulate and support it. From this perspective, the self-study project is seen as an initial contribution to the process of institutionalizing blended learning in the University of Manitoba.

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