



Change Agent's Guide

Case Study – February 2021

Organizational Change Management

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Distance Learning goes Online A Change Effort in Two Cycles

Preface

At this moment of pandemic, all academic institutions from pre-school to graduate professional college are facing the need for new programs of distance learning. In this urgent quest, they are relying heavily on new technologies, which have proliferated in the last two decades. The hope is that, through such technologies, we can leapfrog over learning barriers that would have been impossible a few decades ago and thereby restore a semblance of normality to the entire educational enterprise. However, even with the promise of acceleration, which such new technologies provide, the fundamental processes are as they have always been. We can't simply skip over the several steps, detailed in **the Guide**, that need to be taken to turn promise into reality. We here look back on a problem-solving effort of two decades past which just happens to be highly relevant to our current desperate need.

Introduction

This is the story of an innovation effort in the academic world. It is best conceived as a story involving two principle change agents, an **INITIATOR (ICA)** and a **DEVELOPER (DCA)**. The initiator gets the ball rolling with a concern, an idea, and then a proposal. The developer picks up the idea and the proposal and runs with it to a successful outcome. Together they form a Change Agent team, which expands to include many others along the way.

ICA's Story: Stages 1 to 5

ICA Stage 1: Care

Education has long been considered a fundamental obligation of all cultures. To meet that underlying and pervasive need, the concept of 'education' has expanded over time from six to twelve basic years, and then to all that plus four years of college, and to two to five or more additional years of professional and occupational learning. All these educational events have traditionally taken place in formal settings, in buildings and classrooms, with full time paid teachers, and administrators at all levels. Often as an afterthought but more urgently in recent years, many educators have moved on to the idea that education should be a lifelong activity, an endless process of potential growth at all ages and in all circumstances of work and leisure. Thus have evolved departments of "continuing



education.” These departments are not always well funded or respected by other educators, but they serve as a reminder that there is a much larger world out there that the existing formal ‘system’ is not adequately serving.

In the early 1980’s a lot was also going on in and around the university, which is at the center of this story. These circumstances were highly disruptive of traditional thinking, *unfreezing* the intellectual environment. Start-up engineering companies were popping up everywhere, infused by millions in venture capital, a phenomenon often called “Silicon Valley Fever.” The resulting demand for newly minted engineers was exploding.

A new dean has just taken over the Department Continuing Education (CE), one of several in a large state system. The necessary focus of CE is outreach, extending educational opportunities to the community at large and especially to those underserved by the formal system. The burden of this concern, the “CARE,” lies most heavily on this dean. He has to do something, perhaps many things, to turn this concern into a reality of action.

ICA Stage 2: Relate: Building Relationships To build momentum and to expand the University’s involvement and sharing of the concern, the Dean had to reach out in several directions. The first reach was to stakeholders within the University, itself, the second was to actors within the statewide university structure for continuing education. Thus, the Dean spent his first months educating himself, dividing his time between what was currently in place in his own college and developing relationships with his fellow deans, assessing what could be new audiences and opportunities. These investigations led to direct discussions with other college deans, department chairs and interested faculty concerning their hopes and vision for academic programs.

He also developed a relationship with the Dean of the State-Wide Continuing Education College System, to explore the support mechanisms and possible funding opportunities. In so doing he learned that development grants were available for innovative academic programs. After initial introductions on campus, the Dean reached out to the Chair of Occupational Therapy (OT) in the College of Health and Human Services (CHHS). The Chair was well aware of an impending crisis There were more students applying and being accepted for graduate degrees than the current on-ground state funded program could handle. CE thus seemed to be the perfect partner for some new outreach initiative. CE was always looking for new audiences and products and saw the new program not only as innovative, but also as a new revenue stream for the University. As OT faculty became aware of the possibilities of a new program, they also became intrigued with the opportunity to innovate by delivering knowledge online. The Dean and the Chair together were now, in essence, a *Change Team*.

A lot was learned during this relationship building process. Goals turned out to be quite similar across departments and administrative offices. Many opportunities surfaced from discussions on such matters as how to create efficiencies for new students entering an online program.



ICA Stage 3: Examine

From the Dean's meetings with the Chairs of the many departments, OT stood out. The occupational therapy profession was exploding with applicants, and there were not enough seats for all. At the same time, credentials were changing within the OT discipline. Occupational therapists' already with bachelor's degrees in the field were also in need of knowledge from the discipline. This would mean new degrees and certifications for practitioners.

Both the Dean of CE and the Chair knew immediately that online learning might help fill the need. A new online degree would create opportunities and advantages for both the College of Continuing Education and the Department while demonstrating a new delivery mode to a wide geographical audience. At the same time, it would create a new revenue stream to benefit both the Department and the College of Continuing education.

These relationships eventually became avenues for **Problem Solving** for many new programs. Solving problems became a powerful group process. Eventually the "voice" of collaboration made the technical issues solvable.

ICA Stage 4: Acquire

What would it take to create a new online master's degree? From the Dean's perspective, writing a grant would demonstrate to University administrators that a new revenue stream might evolve. Writing a grant also provided the Chair of the department with an opportunity to increase enrollment and fund "overload work" by faculty. For both the Dean and Chair a grant would also demonstrate "innovation."

The Dean and the Chair of the Department worked together to write up the proposal, including purpose, timeline for development and delivery of the new degree, and a budget including an estimate of financial revenue return to the Department and the College in the 1st cycle of the program. Development costs would be picked up entirely by the Grant. A new tuition revenue stream would pay for new technology costs, teaching salaries per unit, and return on investment to the College of CE and the Department.

There were at least three innovative aspects to the proposal:

1. Understanding the attributes of the technology for delivering knowledge online;
2. An understanding of teaching and learning behaviors with the new technology; and
3. Changing preferred and established teaching modes.

The grant proposal was funded within three months, but even before the grant was approved the Dean of CE knew he needed personnel to manage the program. The CE Dean there upon advertised and hired an **Instructional Developer**. It was The Dean's belief that more online programs would be developed in CE and the Instructional Developer would be the "lead" for this new program.



ICA Stage 5: Try: Does it Work?

With the proposal as a blueprint, a budget, and a newly hired developer as change agent, a new cycle of change was initiated to turn the ideas of the proposal into realities. The developer now ~~takes~~ took charge becoming the primary Change Agent. The Dean and the Chair remained involved as necessary members of his team, but at this point they have done their job of launching a new effort. The program was now in the hands of the Developer Change Agent. He and a cross-disciple team would eventually create new infrastructures in the University to handle the mechanics of the program.

DCA's Story: Stages 1 to 5

We now pick up the story from the developer's point of view. Once again, he has to consider the existing level of concern, (Stage 1 CARE), identify and make meaningful contact with a network of participants and stakeholders (Stage 2; RELATE); identify or re-evaluate the real needs (Stage 3; EXAMINE); assemble the resources required to do the job (Stage 4; ACQUIRE); and put the pieces together in a real program that can be tried, with all its component parts (Stage 5; TRY).

DCA Stage 1: Care

Hired to run a new program, the Developer Change Agent (DCA) had his own Care concerns. Like anyone taking on a new assignment, he wanted to succeed, but more than that, he saw an opportunity to lead in an environment that would appreciate educational product development. The official approval of the original grant was a good starting platform, demonstrating that the university was at least part way committed to change in this direction. Yet, how much commitment there really was, at that point, was unclear. Was it enough to carry a significant change project through to a successful conclusion Part of the DCA's job was to light a fire of enthusiasm to propel the project forward. For that to happen he had to get a lot of other people seriously involved.

DCA Stage 2: Relate - Building Relationships

At the very beginning the **DCA** was given the freedom to learn about the University. The Grant Proposal formally outlined goals and objectives of the new program, but the Dean suggested that he get to know faculty and visit different administrative offices so he could learn the structure of the institution and its inner workings. Consequently, he met with faculty across the campus, including some who were already using new online technology in some form. The DCA's circle of connections gradually widened far beyond the faculty and included Directors of Admissions, Scheduling, Records, Finance, and those in the institutional technology infrastructure.

DCA Stage 3: Examine

Finding a platform became an easier choice than originally thought. In that period of the early 1990s the technology essentially consisted of a modem connected to a phone line. Information was "dumped" to a computer. Students would prepare their assignment offline and then send the information back to the faculty. The key wasn't just technology, but learning how faculty could best use the technology. This required training faculty to



rethink teaching and learning. Over a 10-week period faculty met in groups and individually with a designated trainer/instructional developer to create their new courses. The contract to deliver the program included a section that provided assistance for faculty and students during the entire two and a half years.

Timeline for events needed to be completed. This included:

1. a timeline for faculty development;
2. a specification of how long it would take to complete an online degree;
3. a semester start date;
4. suggestions of where to recruit students; and
5. detailing the processes within the department to select students.

The team of faculty and the **DCA** met regularly to ensure coordination.

Examining the University organization helped the **DCA** to propose the new social arrangements necessary to deliver the program. More opportunities to collaborate with the institutional infrastructure would enhance the program. Developing the relationships early on, led to the creation of a strong business structure in support of online learning. This allowed all concerned departments to build closer relationships benefitting all. Cross Discipline teams, with staff from different departments were scheduled to deal with issues such as registration and the difference of tuition for state and non-state funded students. Other meetings focused on issues such as the distinction between “matriculated” and “non-matriculated” students and the designation of online classes within the printed schedule.

Another set of events complicated early project development. It happened that the University was going through its own process to integrate a new digital platform for admissions, Records, HR, finance, and registration processes; it was noteworthy that continuing education was not included in that system-wide process. This created separate institutional systems that would collide if not dealt with. Unfreezing the systems and institutional attitudes were going to be needed to relieve confusion and create efficiencies that technology would provide.

Diagnosing what was needed included: integrating registration and finance systems, cataloging, course identifications, and creating a more seamless environment for both faculty and students. An integrated infrastructure, linking the university and CE was a foundational building block for digitalization campus wide success.

Other degree and departmental issues included length of a semester, whether a student could take more than 2 courses a semester, what should be the relationship of time and content in an asynchronous format, and how many graduate courses could a working professional graduate student take at one time.



DCA Stage 4: Acquire

What would it take to create a new online master's degree? From the Dean's perspective, writing a grant would demonstrate to University administrators that a new revenue stream might evolve. Writing a grant also provided the Chair of the department with an opportunity to increase enrollment and fund "overload work" by faculty. For both the Dean and Chair a grant would also demonstrate "innovation."

The Dean shared the format for the grant with the Chair of the Department and they worked together to write up the purpose, the timeline for development and delivery of the new degree, and a budget that would reflect cost of development, cost of delivery and financial revenue return to the Department and College in the 1st cycle of the program. Development costs would be picked up entirely by the Grant. That would include a stipend for faculty to learn the technology and develop their courses. CE created a new line item position for an Instructional Designer to lead the program. The feeling of the Dean was this was just the beginning of a new sub-set of online programs that would generate revenue for the College, the University and the Department where new programs would come from. Costs would include faculty salaries, technology to deliver the program, and CE Instructional Developer and staff. A new tuition revenue stream would pay for new technology costs, teaching salaries per unit, and return on investment to the College of CE and the Department. Both the Dean and the Chair had experience writing grants.

There were at least three innovative aspects to the proposal:

1. Understanding the technology for delivering knowledge in the online environment;
2. An understanding of teaching and learning behaviors with the new technology; and
3. Changing preferred and established teaching modes.

The grant proposal was funded within three months, but even before the grant was approved the Dean of CE knew he needed personnel to manage the program. The CE Dean advertised and hired an **Instructional Developer**. It was The Dean's belief that more online programs would be developed.

There were not a lot of companies who could deliver the interactive digital technology when the project started. Furthermore, it was important to stay local and to maintain a close relationship between technology, the online trainer and the faculty. The DCA met with two Internet companies that were delivering digital learning. Both companies were fairly new to delivering educational content online. One offered hosting only. The second company hosted the courses, trained faculty, provided an instructional developer to assist faculty in the creation of their courses, and gave technology support to students for the entire two and a half years of the degree program. The faculty development costs were figured into the cost of tuition for the prospective students in the delivery portion of the budget. The inclusion of the trainer was a very important factor in the decision to choose the one tech group over the other. Understanding the attributes of the technology was



also critical in the decision to select a company. Faculty were given the opportunity to participate in the select of the platform. The trainer provided by company A, whose background was instructional design, proved to be an excellent communicator. With a platform in hand and an instruction developer/trainer to assist faculty, course development could begin.

Faculty courses were placed on Internet web-like pages. The pages looked similar to Syllabus. It contained objectives, assignments, readings assignments, exercises, due dates and grading. The teaching / learning model was “send assignments, students reply and faculty follow-up with comments. Faculty would upload this information, and the student would log on and download the content and log off. When assignments were completed the student dialed the phone and sent the material back to the faculty. Thus, all information processing went through the phone service.

The faculty came to realize that online pedagogy was a joint product of interactions among faculty, student and content. They had to concentrate on rethinking the relationship of content, learning styles and faculty/ content interaction. For students it was about teaching themselves new styles of learning and new communication models. The technology was the electronic conduit to make it happen.

DCA Stage 5: Try

While working with the instructional developer, the Faculty were constantly demonstrating their courses to fellow faculty, but a complete on-line learning module was new to everyone. Evaluating learning outcomes wasn't. There were no student guinea pigs, just some examples of what might be “Best Practices.”

There were a total of 10 courses in the Degree Program. The faculty decided to deliver the program in two, eight week courses per semester, for four semesters including one Summer Semester. This meant the competition for student time between courses was eliminated. Student could concentrate on a particular body of knowledge. This schedule worked to complete the 30 academic hour degree. The faculty designed the sequencing of courses, which would comprise the degree program.

While faculty and course development were moving forward, the technical interface for the administrative side of accepting students into a program, integrating them in the “system” was being developed by the DCA. For example, a new database had to be created for non-state-funded students. The management system also needed to incorporate the total range of types of student, range of tuitions, and cross-referenced with Human Resources and Finance. Once every two weeks meetings were arranged with technicians, programmers, and administrative staffs to ensure that all of the elements were incorporated into the programming. Testing the interface for students to be enrolled and integrated into the “Student System” was constant. Issues would arise and different scenarios were tested. The inter-personal “relationships” created and



developed across the administrative functions made things work. Those teams became the fabric of the new infrastructure.

Since online learning was new to students and faculty, a three-day on-campus orientation was created hopefully to enhance the program. It was designed for the students to meet their online professors, learn the technology, understand the roles and responsibilities of both students and faculty. It would assist in bonding the student with each other. It was believed by the instructional designer and the faculty that creating a sense of community would benefit all and would enhance the opportunity for students to succeed. Besides the online courses, an electronic meeting room was created called “the Coffee House.” This allowed students to meet informally. All but one of students completed the degree on time.

ICA Stage 6: Extend

When the Dean of CE and the Chair of the OT Department met with the DCA to review the original objectives of the program, they agreed that it had achieved its goals. [1] The program was innovative; [2] it was able to graduate a nationwide cohort of students; and [3] it demonstrated that there was a demand for the online program. Evaluations also showed that students were pleased to be able to fulfill their academic goals. With only one student dropping out, the viability of online delivery was clear.

DCA Stage 6: Extend

On the assumption there was a market of working professions for online learning, Continuing Educating partnered with the OT Department in launching a marketing effort to prospective students. They advertised in Journals, and at association meetings and made advances directly to colleagues across the country. This was very fruitful. Inquires and applications arrived within three months. Six months before the start of the first online class, a cohort of 20+ students were admitted for the first online Master Degree. The accepted students came from across the country, but mainly centered from Western States.

Built into the process were several levels of evaluation. The Technology Group and Student Systems Group met to determine how well the processes for administration, students and the faculty worked. Everyone was pleasantly pleased. Faculty was able to move efficiently through the system to deliver their courses. Students were able to communicate with faculty easily. A few minor tweaks were still needed, but, overall, the system preformed as intended.

ICA and DCA

Stage 7: Renewal. What was learned.

Before the last semester of the program, it was the feeling from the OT Department and Continuing Education that the program should continue. Marketing for a second cohort began. The strategy was similar to the beginning of the program. However, at this time,



faculty were already presenting professional papers on their experiences, noting that they were the first school in the country to deliver an online Masters Degree in their field.

After the final semester the students attended a graduation ceremony. It was time to reacquaint themselves with the faculty and each other. Smiles and some tears were experienced. Overall, the online degree program was positive for students and faculty. Both the Department and Continuing Education achieved their goals. The program was innovative and financially successful.

Enhancements were made to course content and learning activities. Students suggested they wanted a digital meeting place outside the academic community to meet socially, so a digital "Coffee House" was designed separate from the academic circle. The Coffee House was a surprise success. The goal was to create increased communication between the students and develop "trust," "sharing" and "collaboration," all skills for learning and the workplace. The first posting was from a student who had given birth to a child in the beginning of the semester. It opened a floodgate to community building one of the goals of the project.

Faculty also met with the DCA and evaluated their online work. They discovered some instructional activities that were highly successful and others that needed more thought or ought to be eliminated. The platform counted the number of interactions students had with the material and the faculty. The faculty shared best practices within their own community. Students evaluated each course as they would regular face-to-face courses, but the evaluations also included questions on the technology and deliverability of the knowledge. Engagement was critical. It was determined that students who had more interaction with the course materials and their faculty increased their opportunity to learn. Originally attrition was a concern of the Chair and the Dean. From the evaluation, just one student was lost and overwhelmed by the quantity of work involved. The overall experience was distinctly positive for the great majority of students.

The program continued for 11 years. Professional Certification and institutional requirements changed over time, moving portions of the content into undergraduate courses. In discussions with faculty, they concluded that one of the most important benefits was the transfer of the instructional design model from their online classes to their on-ground traditional classes. Finally, the structure and form of the program became a model used in other continuing education online programs.