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ABSTRACT

A consortium is the most advanced form of collaboration, in which two or more institutions create a new mechanism to undertake "programs and projects of mutual interest" (Konrad and Small 1989, p. 200). This paper describes three distance-education consortia that were developed among Alberta, Canada, school districts. It describes the project's rationale, the role of the consortia in delivering distance education, the issues that emerged during the development and maintenance of the consortia, the strategies that were utilized to resolve issues, the factors for effective district participation, and the necessary policies and supporting services. A conclusion is that consortia, especially school-district consortia, are more difficult to organize and run successfully than they originally appear to be. Their chief advantages, however, are cost-savings and access to teacher specialists. Obstacles included new staff roles and greater staff workloads, the need for new kinds of leadership, power issues, unclear financial and operational agreements, and districts' reluctance to surrender control and autonomy. The following eight guidelines are offered: (1) establish among all consortia representatives an atmosphere where frequent and open dialogue is expected and where appreciation of others' points of view is the focus; (2) appoint a full-time leader who is granted meaningful authority and independence; (3) develop a clear agreement that specifies financial arrangements, policies, and procedures; (4) develop clear role descriptions; (5) provide support for staff, especially teachers; (6) delegate authority for local decision making to principals; (7) allow sufficient time for planning; and (8) budget for extra personnel and staff time. (Contains 21 references.) (LMI)

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**Issues in Forming School District Consortia
(To Deliver Distance Education)**

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August, 1996

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1. Consortia

1.1 What is a Consortia?

Konrad and Small (1989) define consortia as "the highest level of collaboration wherein two or more institutions agree to establish a new mechanism to undertake, on their behalf, programs and projects of mutual interest" (p.200). Hough (1992) names the four building blocks of a consortium as being (1) personnel, (2) policy and procedures, (3) a financial arrangement, and (4) a management structure. Various other writers agree upon three "essential" elements of a successful consortium: (1) a formal agreement; (2) an agent or consortium coordinator to manage the agreement; and (3) contribution of resources by member organizations (Grupe, 1971; Konrad and Small, 1989; McKenna, 1976; Nelson, 1972).

Reddington (1984) adds to the definition of consortia by noting that educational consortia are formed primarily to provide more cost-effective methods of delivering education to their students at a distance. He states that there are three elemental criteria of a distance learning consortia. These are: (1) "purpose: to educate students; (2) means: telecommunications; and (3) process: an organization, the consortium itself, or an office of same. The process depends upon each individual institutional member" (p.1).

1.2 Why Consortia?

Collaboration is becoming increasingly idealized because it purports to benefit teachers, schools, and districts by not only helping to deliver distance education more effectively but to enhance learning in more general ways. Konrad and Small

(1989) state unequivocally that institutional collaboration (consorting) is essential to achieve the potential of distance education. Moore (1993) also argues strongly for institutions to work cooperatively to re-design themselves as new systems organized into a network of people integrally linked to a whole. Unless distance educators learn to "think big," Moore states, the result will be continued frustration, overworked staff, under achievement of learners, and missed opportunity to maximize technology to truly revolutionize education. Anderson and Neilson (1989) state that not only does collaborative institutional effort improve distance education at all levels, it "has a synergistic effect beyond the participating educational institutions" (p. 210).

Collaborative arrangements among school systems for delivering distance education are not well documented (Hough, 1992). Studies describing post-secondary consortia, such as those cited above, offer some lessons for school district consortia. But, as McGreal and Simand (1992) point out, school systems trying to establish a consortium face very different issues than post-secondary institutions face. Differences in educational philosophies, student needs and interests, financial stability, comfort and experience integrating technology with instruction, and teacher characteristics shape tremendous diversity in the agendas brought to the consortium by school district members. On top of all these natural differences, many consortia set up implicit conflict situations because they are competing for the same students, and students can be converted into numbers which, in turn, represent an influx of money into the system. As a result, building consortia represents both an educational and a business opportunity.

Establishing and maintaining a consortium is more difficult than it would appear. One of the basic conflicts within the structure of a consortium is the basic core commitment of a district versus the nebulous commitment to the "other" --

the consortia body. On top of these difficulties, the whole enterprise is complicated by the fact that most school districts are organized into traditional hierarchical bureaucracies that don't lend themselves easily to radical restructuring.

Although many examples of consortia are mentioned in Journal of Distance Education reports of distance education initiatives, few reports focus specifically on the model used to organize the consortia, the issues and concerns related to consortia management and operation, the impact of membership in the consortium on individual district operations, organization and governance, the general benefits for distance education of collaboration among institutions, and the relative advantages or disadvantages encountered in administering a consortia in a particular way. Institutions considering the initiation of a collaborative venture to help deliver distance education may be asking questions such as the following:

1. Why form a consortium?
2. How can a collaborative arrangement help deliver distance education?
3. What issues might be expected to emerge in the process of developing and maintaining a consortium?
4. How might these issues be resolved?
5. What factors enhance the capacity of a district to participate effectively in a network of districts?
6. What programs, personnel, policies, and supporting services need to be considered?
7. Overall, do the advantages offered by a consortium, in terms of enhancing student learning at a distance, outweigh the disadvantages?

An examination of Alberta's distance education consortia offers some suggestions in response to these questions. In Alberta, a wide variety of new distance education programs for high school students were made available by the provincial government in 1987. Some districts reconfigured themselves internally to provide these distance education courses. Some set themselves up as mini-consortia, sharing teacher expertise among their own schools. Other rural school districts formed themselves into consortia between 1987 and 1990 to pool resources for what they speculated would be better, more cost-effective delivery of the new courses.

Each consortium developed very different organizational structures, financial arrangements, and management processes to coordinate the people and activities in member school districts. While each consortium experienced somewhat different concerns related to their unique contexts, similar issues arose and each consortium developed particular strategies to overcome them. The remainder of this paper presents a discussion of these issues in relation to five of the questions listed above, using experience gained from an analysis of Alberta's model and with reference to related literature on consortia. In this discussion, the related literature focuses on the implementation of consortia among school districts for the purposes of delivering distance education.

2. Background to Alberta Education's Distance Education Program

When Alberta Education implemented distance education programs in small rural schools, it was attempting to address what had been identified as the difficulty experienced by these schools in providing high school students with "access to equitable educational opportunities" (Alberta Education, 1985, p. 8). Pilot projects were launched between 1987 and 1988. In these projects, a group of 13 schools in southeast Alberta and a group of 26 schools in the northeast were chosen to receive distance education. Packages of course materials in a wide range of subjects were prepared by the Alberta Distance Learning Center, a branch of the provincial department of education.

Participating schools each provided the pilot project with a distance education coordinator and a place in the schools where students could complete the course materials. Schools were equipped with fax machines, teleconferencing equipment, and later with personal computers. In the northeast, schools also were equipped with a computer-managed learning (CML) system and a Digital Microvax microcomputer for delivering modularized materials in mathematics. Each jurisdiction provided an off-site specialist teacher, known as a "tutor-marker," who was given a fax machine. This tutor marker worked at home tutoring and marking the student work in at least one subject throughout the participating jurisdictions. Internal and independent evaluations of the programs suggested that distance delivery of these course packages in the project was successful. The evaluations showed that student satisfaction and achievement relative to cost-

effectiveness was high (Alberta Education, 1990; Clark and Schiemann, 1990; Clark and Haughey, 1990).

Part of the environment that encouraged the development of these consortia were that new high school diploma requirements were mandated by the Alberta Government to be phased in over a three-year period beginning in 1988 for Grade 10 students. These requirements increased the number of subjects or credits a student must complete to earn a diploma. Small schools were already struggling to provide high school programming, and the new requirements posed additional demands for specialist teachers in core subjects, provision of a broader curriculum, and potential changes in students enrollment patterns.

To help ensure access and equity in these small schools, Alberta Education believed and created the vehicle of distance education, hoping that the implementation of distance education, with the main focus being on grades 10, 11, and 12 in rural schools, would help ensure this access and equity. The purpose of distance education was defined as a means to “enable the school to provide courses not otherwise available by traditional delivery methods due to (a) insufficient student numbers in these courses, or (b) absence of an on-site specialist to deliver these courses” (Alberta Education, 1990, p.2).

Today, while Alberta Education retains overall authority and responsibility for education including distance education in the province, school districts have the same responsibility for distance education that they assume for traditional schooling. That is, they must ensure that every student has access to a quality education consistent with the student’s abilities and equitable in standard regardless of where the student lives. Schools must ensure distance education course material

is delivered to meet individual student needs effectively, must award marks and credits, record and report student progress, and maintain contact with parents.

The Alberta Distance Learning Center continues to develop and publish the distance education materials used by these schools. It also selects and makes available other print, non-print, and computer learning resources for distance education programs; and, it assists jurisdictions through services in coordination, consultation, inservicing, and evaluation. School jurisdictions purchase course packages from ADLC directly through another government agency, the Learning Resources Distributing Center. As a result of these governmental services, distance education is centralized in design but decentralized in delivery.

Alberta Education encourages collaboration among schools and districts, advising legal partnerships bound by contracts clearly spelling out governance, financial management, and day-to-day operation (Alberta Education, 1990: 13). Alberta Education also describes, in detail, those "suggested" models for distance education delivery (such as the Multi-Subject and Multi-School models). Alberta Education also spells out the responsibilities of various personnel involved in these models (tutor-markers, school coordinator, principal, district coordinator, and superintendent). However, schools are advised to "look at the models described and take the parts that meet your needs, and create your own custom model" (Alberta Education, 1990, p. 10).

After the initial pilot studies were completed, 80 high school distance education courses including nine Computer Managed Learning mathematics courses were available in 1989-90. A total of 80,000 credits were taken by 6,000 students. Today even more courses are available, and the program is becoming

increasing popular among students. Courses are designed for use in classroom settings and involve a wide range of teaching modes. These models include computer applications, lab experiments, video and audio tapes, print-based workbooks, and face-to-face and teleconference group discussion.

Students typically complete activities independently under the supervision of a teacher in a regular classroom or distance education room, then submit assignments for marking by a school-based "tutor-marker" subject specialist (or assignments are "FAXED" to an off-site tutor-marker working from home or office in another school or jurisdiction. This tutor-marker is responsible for the evaluation and instruction of students. Usually a school-based distance education coordinator facilitates student registration, flow of materials, tutor-marker arrangements, student progress records and reports, and general operation of distance education within the school. Where schools form a collaborative network to deliver distance education programs, usually a jurisdictional distance education coordinator is appointed.

To encourage schools to implement the new distance education initiative, Alberta Education made a Distance Education Grant available to all eligible jurisdictions. To be eligible, jurisdictions had to have fewer than 150 students, had to offer at least one distance education course, had to be at least 30 km. from a high school with 150 or more students, and had to have a jurisdiction assessment per student of less than \$100,000. Schools which met these criteria could receive a one-time equipment accession and installation grant and an operating grant based on the number of distance education student-credits offered. Alberta Education stated, in 1990, its expectation that jurisdictions wishing to participate in distance education

would also contribute to the cost of programs from local resources, and recently the government announced an 8% cut in the operating grant.

Consortia Formed by Rural Jurisdictions: Rationale, Organization, Management and Financial Arrangements

Many rural school jurisdictions in Alberta decided to form working partnerships with other districts. Chiefly they made this choice in an effort to minimize costs of distance education delivery by sharing people and resources and to gain access to a broader range of subject specialist tutor-markers. One deputy superintendent also reasoned that "we felt very strongly there was a need for some coordination and direction, and we didn't feel we had the expertise to provide that" (Hough, 1992, p. 202).

Districts that chose not to join a consortia stated cost to be a main reason: they stated that there was enough subject expertise among the staff of their own schools to provide the necessary tutor-marker services and that the financial costs of joining an existing consortia did not appear to be justified for them. A secondary cost, and an important consideration, was the belief that jurisdictions would lose a certain amount of autonomy and control in programming when joining a consortia. Some districts did not feel this was justified by the potential gains offered by a consortium's resources.

The organization of each consortium was very different and seemed to evolve according to such factors as the shared philosophy of participating jurisdictions, the personalities instrumental in the consortium's formation, the role ascribed to technology, and the circumstances of its actual genesis. Some

jurisdictions had been involved in the initial pilot studies and, as a result, brought together administrators with three years' experience managing distance education programs and schools with well-established distance education arrangements. One consortium, which covered an area of 65,000 square kilometers, developed a centralized structure with one jurisdiction managing operations and with a decision-making structured as an Agent Board. Another, four times smaller in size, endeavored to preserve the autonomy of participating districts as much as possible. A third, characterized as espousing an entrepreneurial philosophy (Hough, 1992) was concerned that technology such as the CML and VAX machines would pre-determine the organization. This third consortium strove to avoid this concern by creating an organizational "superschool" where technology would be applied after the structure was in place.

Today about 2000 senior students in almost 150 schools throughout Alberta are using the distance education courses to complement their high school programs. The southeast group of districts involved in the original pilot project formally established themselves as two consortia, and a new consortium has been developed. Each has created its own management structure and financial arrangements for the buying and selling of distance education services and the subsequent collection and distribution of funds. All three, like all schools in Alberta offering distance education, apply for the provincial Distance Education Grants made available to each school with fewer than 150 students located at least 30 kilometers from a larger high school with more than 150 senior students.

Three Alberta Consortia

(I) Consortium One: The Central East Distance Education Consortium

The Central East Distance Education Consortium (CEDEC) drew together 6 districts, representing a total of 17 schools involved in delivering distance education. Each school was charged \$110 per course credit, an interesting amount considering the lower costs in other Alberta consortia. Tutor-markers earned \$100 per credit for their districts, translating to about \$100,000 per year for a full-time tutor-marker, given the average load of 500 credits per term. This amount was roughly double the cost of a tutor-marker's salary, and created a profit-making potential especially for the larger boards.

Participating districts in CEDEC were very interested in protecting their respective control over the education of their own students, so the consortium was specifically structured to maintain each district's autonomy. Policy and procedures of the consortium were allowed to evolve according to the issues and needs of the jurisdiction that emerged during the course of early implementation of the distance education programs. The consortium body did not function independently of the districts. No single jurisdiction or director made decisions without the consensus of the other participants.

A quarter-time coordinator was hired to manage the buying and selling of credits among the districts (priced at \$100 per course credit). The consortium was managed at two levels. At the first level, the Management Committee was comprised of the superintendents of each participating district. These superintendents established fees, policies, and budget, while the coordinating committee handled day-to-day operations. According to Hough (1992), the arrangement created a "potential for disharmony" among districts (p. 87).

Conflicting understandings grew within the districts. These conflicting understandings centered on issues like (1) which staff were involved in the new

distance education programs, (2) how conflicting expectations about the "trade-offs" of teacher tutor-time versus the course credits purchased by each district should be solved, and (3) about how conflicting partisan interests of superintendents, who understandably promoted the unique agendas of their district, should be worked out. Hough (1992) also reported that these conflicts often blocked consensus and mitigated against the speedy decision-making required for smooth operation of the consortium.

(II) Consortium One: The Big Sky Consortium

The Big Sky Consortium involved 10 districts situated in the southeast area of Alberta and measuring about 65,000 square kilometers. Twenty-two schools in Big Sky deliver distance education, many of which had three years' experience as a result of their involvement in the distance education pilot projects. Protection of autonomy was not a key concern among districts and schools in the Big Sky Consortium.

Unlike CEDEC, Big Sky is very centralized in its organization and management. This consortium wrote out clear policies describing responsibilities and activities of governance, membership, and financial arrangements. Jurisdictions in the Big Sky consortium decided to appoint one district to act as an "agent board." This district assumes the duties of daily operation.

Districts paid a start-up fee of \$1000 to join the consortium, plus \$65 per course credit. Three committees governed the consortium. Policy-making and budget approval was assumed by the Trustee Committee, which acted upon the recommendations of the Management Committee (comprised of the district

superintendents). This committee reviewed policy and budget. A half-time Coordinator made many of the operational decisions, with input from the Executive Committee (a branch of the management committee). "Employment and deployment of tutor-makers was a consortium management decision -- depends on consortia's needs and not on jurisdictions' artificial needs to fill a quota or provide work for under-utilized staff members " (Hough, p.149). Tutor-markers were paid by the consortium, which compensated the local jurisdictions that employed the tutor-markers. As a result, any profit potential incurred by tutor-markers, earning more through their compensation for course credits than the cost of their salary cost, went to the consortium for the potential benefit of all.

(III) Consortium Three: West Central Alberta Distance Education Consortium

In contrast to both CEDEC and Big Sky, the West Central Alberta Distance Education Consortium (WCADEC) took an entrepreneurial approach to setting up a consortium. Thirteen schools in nine jurisdictions became members. Two motives were reported by participating districts for forming the consortium. First, the districts stated the need to gain access to expertise in finding direction and implementing the new distance education program. Second, the district stated the need to share teacher expertise by gaining access to tutor-markers specializing in subject areas in which the district had limited teacher expertise.

Boards who joined the consortium paid \$6000 to join, plus \$60 per course credit. This \$60 per course credit was a less onerous fee for those jurisdictions needing to pay for tutor-marker services. In contrast to Big Sky and CEDEC, a full-time coordinator was hired to manage the buying and selling of courses and the other responsibilities of developing the consortium. One board was appointed as the

Agent Board, and this board was empowered to make operational decisions and manage all the funds in a course credit exchange. Each participating school could choose to pay for course credits or balance their own credits and debits.

Educational policy was established by a Board of Governors (school board representatives), while a Management Committee consisting of district superintendents made recommendations to the Agent Board. Most of the distance education course credits were tutor-marked by regular teachers employed within the member schools. No additional payments of tutor-markers was required. Teacher tutor-markers often did not work at home, as was typical in other consortia, but were encouraged to remain in the schools and take part in regular school activities.

Question One: Why form a consortium? How can a collaborative arrangement help deliver distance education?

Positive Points About Consortia

A consortium formed to deliver distance education can function primarily as a coordinating body, like the Ontario Contact North/ Contact Nord consortium established in 1986 to provide correspondence courses for primary and secondary students and for adult basic education. According to Anderson & Nelson (1989), the Contact North consortium serves three main purposes:

(1) The consortium facilitates accessibility. It helps link individuals, isolated socially or geographically, to the programs of two universities, five colleges, and the Independent Learning Center.

(2) The consortium provides information. It offers advice about local and provincial policy. It also offers advice about administrative expertise on issues related to delivery and support of distance education: these include contracts,

acquisition and compatibility of technology, student support services, professional development, course development, and consolidation and expansion of community and institutional cooperation.

(3) The consortium helps avoid duplication of services among its member institutions. The existence of the consortium "body" consolidates and expands the cooperation of different institutions with the community they serve.

Konrad and Small (1989) draw similar conclusions about the functional benefits offered by consortia for the delivery of distance education. Their findings were derived from their analysis of cooperative ventures sought by post-secondary institutions because of fiscal constraints. For these colleges and universities, collaboration apparently helped reduce costs, eliminate duplication, strengthen the quality of courses and services, and provide "better options for an ever-increasing diversity of learners" (Konrad & Small, 1989, p. 202).

In Alberta, school districts apparently joined consortia for two key reasons: (1) they predicted they might minimize the costs of providing distance education and (2) they wanted access to teacher tutor-markers who offered subject matter expertise that was limited or unavailable in their own districts. Interestingly enough, while most district superintendents stated that membership in a consortia was actually more cost-effective than trying to offer distance education programs on their own, in fact there was little evidence to support their belief (Hough, 1992). In any case, jurisdictions thinking of joining a consortia at least have the opportunity to ask themselves first if it's more feasible economically to buy resources from a consortia or to pay for additional staff themselves using the same amount of dollars.

Some district representatives noted the importance they attached to working collaboratively with educators other jurisdictions. They liked the support from others hiring tutor-markers, the assistance with governance, and the opportunities to associate positively with other jurisdictions. One Alberta superintendent who participated in a consortium, noted that the "team " approach had definite advantages for smaller school systems by ensuring the continuation of distance education delivery "because we all have strengths and weaknesses in different areas".

Negative Points About Consortia

However, despite the positive effects that consortia had on school jurisdictions, there were some negative effects about consortia. For example, in Alberta, school jurisdictions don't have a history of collaborating with other districts. With the establishment of distance education consortia, these new ventures in cooperative organization uncovered what for some districts were new questions about their relationships to their staffs, students, and other school districts.

One practical problem with consortia was that joining a consortia of school districts means finding new ways to understand what it means to plan and budget programs interdependently with districts who do things differently. Working within a consortia means having to learn to trust other systems to provide services the district must rely on. It means negotiating decision-making and authority in various areas influencing the operation of the cooperative program.

For some jurisdictions, interdependence is interpreted as a rather frightening loss of autonomy. In districts which opted not to join a consortium, some principals indicated they would prefer to control their own schools and use funds to run their

own distance education programs without any interventions by outside agencies. In response to this concern, one consortium coordinator commented that "I don't believe that can happen, because a small school can't function; they can't supply the product. If you've got twenty-six students and three staff members, you're not going to be able to offer that [a broader curriculum] unless you take those kids and haul them to the next town." Districts who join a consortium essentially must decide whether the surrender of a certain amount of control over their own programs is worth the gain, if any, in saving costs and sharing expertise.

Question Two: What issues might be expected to emerge in the process of developing and maintaining a consortium?

Reddington (1984) points out that educational consortia have a propensity to fail and argues that the reasons for failure lie in traditional ways of structuring a consortium as the sum of its institutional parts. That is, each member "cooperates" in a group that tries to serve and balance the interests of the whole. This group, maintains Reddington, functions as an dependent body, limited by the understandings and interests of each member (including the "weakest link") and often dumped with the unwanted burdens of member institutions. Other researchers have noted that consortia also create natural barriers that stop them from functioning well (Konrad and Small, 1989) in post-secondary distance education cooperatives. These authors noted that professional freedom and independence were chief among these barriers.

Similar difficulties are experienced by consortias of school districts, with added complications caused by the often inflexible procedures and organizational structures already governing school systems. McGreal and Simand (1992) outlined

problems experienced in the organization and delivery of distance learning to secondary schools through a consortia established in northern Ontario (Contact North). Members of the consortia included different religious and linguistic school boards, each competing for students and each comprised of schools with different student and program needs, teacher expertise, teacher technological interest, comfort, and administrator characteristics.

Because of the diversity that consortia naturally have, the organization of course delivery within the consortia (cooperative time tabling, teacher release, coordination of program offerings, and administrative support) is burdensome and sometimes impossible to achieve. Struggling to offer courses by distance within the conventional structure of the schools creates all kinds of problems. For example, student must somehow be supervised within the regular timetable. Agreements among schools to trade course offerings must somehow be maintained, even when varying student interest and enrollment in each school makes it difficult for some to participate. Other "regular" program offerings at the school must somehow be protected from the migration of students into the distance learning alternatives.

Alberta's experience echoes some of the problems reported in this Ontario consortium. Although distance learning is more centralized in Alberta, in that Alberta Education produces and distributes the course materials, issues similar to those in Ontario's consortium were encountered. These issues stemmed from problems with coordinating teacher supervisors and tutor-makers across districts and the difficulty of maintaining a regular school staffed by teachers and governed by a classroom timetable at the same time as making distance education courses available. In Alberta, other issues that emerged as the consortia began operation related to staff, leadership, clarity, and problems with control and commitment.

Staff Issues: New Roles and Changing Workloads

New Roles: Teacher Tutor-Markers

A new role, that of the teacher tutor-marker, was created by the implementation of Alberta's distance education consortia. The job description suggested that these people could be full-time or part-time teacher tutor-markers; or, they could be regular classroom teachers taking on extra duties. The looseness of job definition also caused some difficulties with other aspects of the job.

Pay scales and working conditions were two such aspects. For example, Hough (1992) discovered that there were a variety of different payment scales and working conditions for teacher tutor-markers in different parts of the same consortium. Some teacher tutor-markers were supplied with fax machines and microcomputers and allowed to work at home. Others were expected to travel regularly to a site containing a fax machine, or to attend a school just like a regular staff member. Common sense alone would suggest that these varying working conditions, in themselves, would encourage a different level of commitment (or distraction) to the task of tutor marking.

Complicating the issue further, tutor-markers typically worked across jurisdictional boundaries where different general teacher agreements are in effect specifying salary and duties. In effect, some tutor markers were serving several masters. In his study of one Alberta school district implementing distance education, Clark (1990) drew specific attention to the duties, responsibilities, and authority of the tutor-markers. He stressed the unique demands of this role in contrast to the skills and understandings required for regular classroom teaching

and recommended that more careful attention be paid to selecting and educating teacher tutor-markers.

Hough (1992) expresses serious concern over the lack of consideration by the government or the teacher association for the implications of this very unique role of tutor-marker. He suggests the inherent problems that would typically occur where there are such vast differences in terms of establishing and regulating salary and benefits, duties, general conditions of employment, and teacher evaluation. In light of Clark's assessment of the tutor-marker role, one could also add implications for institutions and agencies involved in teacher education and continuing professional development.

Teachers' Changing Workloads

As distance education in Alberta becomes a more popular option among students, and traditional classroom offerings are decreased, some teachers in smaller schools must take on the duties of teacher tutor-marking or distance education coordinating to supplement their work as classroom teachers in order to maintain a full-time load. Not all teachers were reportedly happy about this unexpected change in the nature of their work.

Often inservice is not available to assist teachers into the very different pedagogical demands of these new roles. A general need was expressed by several Alberta superintendents for more inservice opportunities for both teachers and administrators. These inservice opportunities were seen as helpful for allowing the sharing of experiences, fostering understanding of the distance education process, and providing assistance in naming and solving problems.

Duties Added to Staffs' Full-time Workloads

In some districts, a problem was reported that full-time teacher tutor-markers are expected to take on "double duty." These full-time teacher tutor-markers, on one hand, acted as in-school student supervisors while they were in the process of marking the work of their own distance education students. Some teachers or tutor-markers were expected to assume the necessary clerical tasks required to maintain the distance education programs without time for these extra duties being figured into their work loads. Some teachers were expected to teach full-time as well as provide services as tutor-markers. Some full-time administrators also had to assume additional responsibilities as supervisors without compensation.

The result of all these different roles and expectations was, often, over work. On top of the very heavy workload teachers assumed, there was certain to be an amount of resentment that was built over the "volunteer" staff time required in certain parts of some consortiums. As one principal remarked, staff will only contribute their own "volunteer" time for so long before they withdraw services volunteered to help launch an innovation.

Extra Clerical Work

Externally marked courses incur extra hours of clerical duties in faxing, recording, distributing and reporting. One principal estimated that this work took an extra two hours per day of clerical work to run the 200 distance education credits students were taking in his school (forty 5-credit courses). In some schools no extra clerical assistant was available, so this time had to be taken from the regular clerical support provided to school staff. The end result was an arrangement that was not satisfactory .

Changing Leadership

No full-time leader with meaningful authority.

In Alberta consortia, where no officially appointed director or coordinator is granted full authority to make decisions, participating school districts reported experiencing a sense of no direction (Gonnet, 1991). Roles and responsibilities throughout the consortia were unclear, producing some inconsistency and staff frustration. A management committee had to absorb all the duties of coordination.

In many ways, consortia proved no different than any other business. Operational management by any committee proved to be slow at best. All practical decisions had to be negotiated, which was not only a cumbersome process but also left little time for important concerns of leadership such as reflection, evaluation, planning new directions, or proactively exercising initiative.

In two Alberta consortia, the distance education coordinator was only paid for part-time work even though both discovered that the duties involved in running a consortium effectively were closer to a full-time workload. The high volume of buying and selling of credits among districts was unexpected, and the extra time incurred by the coordinator's travel across large rural areas was not always evident at the commencement of the consortium. The one consortium that hired a full-time coordinator reported that it was very happy it did so (Hough, 1992).

Generally, in consortia where the coordinator was trusted to act independently, member districts seemed happier and operations were more efficient than in consortia where the coordinator was not empowered with full decision-making authority.

School Principals: Responses and Changing Roles

School principals who were part of a consortium of school districts were caught in a difficult position. On the one hand, they were directly accountable for the learning experiences and achievement of the students in their own schools. In many cases principals were also responsible for their own budgets. On the other hand they must, as distance education consortium members, be willing to relinquish control over significant aspects of instructional delivery and student accountability. They must rely on tutor-markers paid and supervised according to regulations governing other jurisdictions. In turn these tutor-markers must deal with students working and supervised in other districts.

Issues impacting the consortia surround all aspects of this cross-district student-teacher relationship. These issues included motivating and facilitating student learning, assessing achievement in a timely way, and reporting and tracking students' progress. As an example of the sorts of practical problems that arose, a student who was allowed in a particular school until June 20 to complete a course then created a rush for the tutor-marker who lives in a different district and cannot influence the situation except through that district's hierarchy. The tutor-marker's late assessment, through no fault of his or her own, and the process for submitting that assessment potentially holds up the school which needs the student's results to report to parents before the year end.

Distance education courses created changes in the structure of a school's enrollment that were sometimes viewed as "disruptive" and undesirable by principals who thought of their function as maintaining stability in student enrollment and other conventional school structures. In one school an administrator interviewed by Hough would not allow students to take a distance education course if the school offered that particular course in the regular timetable. In another school a principal noted that the school already had very small classes

and noted that, if two or three students were removed from each class and placed into distance education, there would not be a class left. He noted that the school insisted that, unless students were really opposed to those classes in the school, they should take the in-school classes rather than the distance education classes.

Many principals felt that the new distance education programs were forced on them, without their involvement in determining how and when to implement them, how to distribute the work among their school staff, and how to work with other schools and districts to share resources. Gonnet (1991) found that when principals' input into the consortia decision-making was not actively sought and used and principals' roles were not clearly defined, tasks began slipping "between the cracks". Principals described feeling frustrated because they were "flying by the seat of their pants". They experienced little sense of owning the policies and guidelines governing the consortia. Gonnet (1991) suggested that they felt little consideration of the important concerns and issues of distance education in their context.

Hough (1992) stated that principals needed to be encouraged to use distance education to fill a need in their schools and discouraged them from using distance education to acquire more resources. When the Alberta government made equipment and technology available to schools willing to jump into the new distance education programs, principals naturally wanted to take advantage of the opportunity without necessarily having time to figure out the implementation of the innovation.

Hough also concludes that the principal's cooperation was key to the success of the distance education consortia. This cooperation has implications for involving principals in meaningful decision-making about distance education, for providing

plenty of information about the nature of distance education and ways to implement it effectively, and for offering timely and helpful assistance to principals as they work through the process of implementation. A consortium, it would seem, would have the ability to offer the resources needed to provide the sorts of assistance principals might find valuable.

3. Creating Clarity

Unclear Channels of Communication.

Throughout studies on distance education and consortia building, it has been clear that administrators, teachers, and distance education coordinators in the consortia have wanted "face to face" communication, with clear records maintained and communicated to all, to discuss policies, procedures, and issues related to implementation. When channels and opportunity for this conversation didn't exist, negative perceptions of the distance education programs and the consortia management process sometimes developed. Changing players in school districts, an increasingly frequent state of affairs, disrupts continuity of understandings and operation in the consortia when clear communication channels and records don't exist.

Unclear Financial Agreement

Gonnet (1991) suggests that consortia should expect problems related to ambiguous financial arrangements. The consortia and each member board are mutually dependent to maintain their financial responsibilities and their commitments to a central student registry. Districts expect trade-offs, but expect equal trade-offs. When there is no clear written agreement detailing these arrangements, the result is often distrust on the part of certain districts of the

consortium, especially as these consortia become concerned that they are not getting adequate returns for the services they give. In the Alberta CEDEC example, for instance, no document stated clearly the apparent agreement that each district would supply teacher tutor-marker services roughly equivalent to the amount of student course credits used. The result of this lack of clarity was some confusion and conflict.

Discrepancies sometimes emerged between central registry figures and individual jurisdiction figures. These discrepancies made billing difficult. The consortia can't easily plan its budget without reasonably accurate estimates of student enrollees from member boards .

Balancing Control and Commitment

Lack of Sufficient Planning Time.

Rapid implementation of distance education, especially while struggling to establish the school district consortia, produces a variety of problems. The consortia studied by Gonnet (1991) reported that operations were starting before planning was completed. This operational order led to confusion in guidelines and procedures, problems in student registration and supervision, and courses beginning before materials were available. In general, problems and questions emerged before answers were available.

The demand for distance education courses exceeded the prediction, straining the coordinators and the fledgling consortium infrastructures struggling to run operations. Policies to solve immediate problems were increasingly drafted quickly at upper levels, often time constraints not allowing anything more than minimal

conversation with staff. As a result, people dealing with operational concerns were sometimes unaware what policies existed to govern what they were doing.

Balancing District Input and Receipts.

In Alberta's school district consortia delivering distance education, both Hough (1992) and Gonnet (1991) found issues of concern related to balancing the input of time and dollars of the various districts belonging to the consortia. Each district was very concerned that the cost of purchasing courses from the consortium would be justified in terms of the quality and timeliness of the tutor-marker services they received from the other districts. The fact that the evaluation of the tutor-markers was raised as an issue indicates that districts were not always satisfied with the trade-off.

The research on consortia suggest that problems arise when implications of the consortium's plans for a financial infrastructure are not completely thought through or when these arrangements are not clearly articulated and understood by all consortium members. For instance, in one particular consortium the financial arrangements created a profit-making potential for larger districts . Each tutor-marker earned \$100 per course credit for the district. A tutor-marker's typical full-time load was 1000 credits, which would earn \$100,000 for the jurisdiction supplying that tutor-marker. This activity became a way for jurisdictions to generate income because the income made from the work of each tutor marker was far more than the salary for a full-time staff member. Other smaller district members who join the consortium to gain access to the specialist tutor-markers belonging to the larger districts were paying \$110 per course credit. This cost, although it was cheaper than hiring a full-time teacher or tutor marked was a significant load to bear (both

financially and psychologically, especially when districts in other Alberta consortiums were paying \$60 per credit for the same courses.

Teachers' Commitment to Distance Education

Teachers' responses to innovation, ranging from hesitancy or even resistance to enthusiasm, are an important focus for attention when implementing any distance education curriculum project. Although not directly related to the operations of the Alberta consortia, teacher learning about and reaction to the new distance education programs create issues in different districts. Teachers and jurisdictions within these different districts can presumably find ways of sharing and working through these concerns through the collaborative vehicle of the consortium. Teachers' levels of involvement with distance education affect their feelings about the program, its supporting technology, the consortium, and the implications of these new features of their work life on their own sense of themselves and their work.

Representatives of Alberta school districts talked about the variety of elements which affected their teachers' responses to the distance education innovations. Their responses resonate with four main "barriers" to teacher learning and change to integrate an innovation into their work.

1. School structures: hierarchical, authoritative leadership, restrictive school policies and practices, a lack of openness to teacher risk or acceptance of "mistakes".
2. Conditions of teachers' work: overload, time pressures, bigger classes, other instructional and non-instructional priorities, competing implementations of new programs.

3. Pressure to maintain status quo: lack of real administrative or parent support for innovation and its consequences.

4. Teachers' focus on own particular classroom situation: lack of "systems thinking", not seeing self and own students in relation to larger trends and the overall educational system.

Some teachers in those Alberta schools which implemented distance education apparently were afraid the new programs will turn out to be a means of replacing teachers in the future. Other teachers apparently found the changes in attitudes and philosophy required by facilitating distance education disturbing. One superintendent explained that distance education must focus on the learner rather than the unit of time required to fill with instructional activity (Hough, 1992). Another superintendent felt that "traditional" teachers must re-conceptualize their relationships with students in a much closer, more personal way to ensure that student's success -- a new way that this superintendent perceived was a threat to some teachers.

Interestingly, superintendents and school-based administrators report that teachers tend to resist distance education and need to undergo significant change. However, those distance education coordinators who had the most contact with teachers involved with implementing the innovation held a rather different opinion. They reported that most teachers were positive about the distance education programming.

Partisan District Interests

In the Alberta CEDEC example, each district is represented by a superintendent who sits on the Coordinating committee that runs the consortium.

These superintendent representatives often blocked consensus in their attempts to protect their district's interests. As a result of their consensus-blocking efforts, making speedy decisions was difficult. The impact of these actions tended to impede the operation of the consortium and intruded on the time of superintendents. Because distance education was only one of the many new program priorities of the district superintendents, these superintendents often had little enough time to dedicate to the consortium. Power struggles seemed to ensue in consortia where the autonomy of each district was protected, where each feared losing control over the education of its students (Hough, 1992, p. 89).

Essentially most school districts were committed first to their own students, community, and staff. Their commitment to the consortium was second, and likely the extent of the commitment was nebulous. There was no inherent interest in maintaining and developing the consortium as an entity in itself. Districts made particular decisions because they wanted to survive (a particular concern in today's milieu of drastically reduced resources and recent government initiatives in Alberta to amalgamate districts), increase public involvement in schools, and demand accountability.

The actions of school jurisdictions was not in itself surprising. The school jurisdictions being studied were interested in the distance education consortium chiefly for what it contributed to their survival as districts. Because school districts compete for students (who each bring provincial dollars with them), it would be naive to think that districts should develop loyalty to one another. Their efforts to collaborate to build a consortium must be understood as an action that sought to find a way to exchange services with reasonable equity and mutual satisfaction.

Question Three: How might these issues be resolved? What factors enhance the capacity of a district to participate effectively in a network of districts? What programs, personnel, policies, and supporting services need to be considered?

The best way to determine the applicability of different suggestions for resolving the various difficulties experienced by consortia is to consider the contexts in which these suggestions might work. The whole process of building a consortium must be understood within the context of each particular school district, the intersection of that district with other school districts within the consortia, the political milieu in which the consortia lives and operates, the resources that are available to support the distance education initiative, and the general community environment to which each school and district must be responsive. Contextual characteristics that can affect consortia operation significantly include:

- Administrative structures, policies, decision-making processes, leadership styles operating in each district.
- School cultures, traditions and history, social norms, beliefs and values, and sub-cultures.
- Community beliefs, values, expectations, degree of active involvement in and support for school programs and change initiatives.
- Regular curricula, special programs, languages, schedules, resources.
- Technology in the school: resources, past implementation efforts, staff and student attitudes.

- Philosophies in each district regarding teaching and learning, the role of distance education, future directions for technology and distance education within the district, goals, values and needs for distance education.

In Alberta, the consortia have been conceived in traditional terms of school governance. They have also been incorporated into the province's educational system as a new level of bureaucracy existing mainly to coordinate resource exchange. The effectiveness of the operation of the Alberta consortia do not appear to be related to the particular structures in which they are organized or managed. Instead, the most significant factors influencing consortia effectiveness determined by Hough (1992) are the existence of a comprehensive agreement, clear policy and procedures understood by all, time allotted for planning, and the empowerment of a coordinator to make decisions on behalf of the consortium.

Staff Issues: Changing Roles and Workloads

Develop clear role descriptions that are consistent across the consortia.

When the establishment of a consortia creates a new staff role, such as that of the teacher tutor-marker, careful thought must be given to understanding not only the responsibilities and duties of the role, but also to the relationship of the role to the existing structure of people and power distribution in the system. Alberta's example demonstrates that conflict can develop where unclear understandings of just what sorts of duties constitute a full-time tutor-marker's job, and what conditions and compensation are fair, result in inconsistent expectations in different parts of the consortium. Gonnet (1991) suggests that the consortium agreement is the place to specify aspects of workload, training, duties, evaluation and feedback

procedures, salary, and authority attending any new personnel roles, especially that of the tutor-marker. These specifications should be stated early in the consortia's development.

Hough (1992) also expresses concern that appointments of staff to new roles created by distance education programming must be governed by the consortia's needs, and "not on jurisdictions' artificial needs to fill a quota or provide work for under-utilized staff members" (p.149).

Provide support to teachers adjusting to the consortia arrangements.

Changing workloads and expectations for teachers and other staff produced by the distance education consortia created inservice needs, not only to gain expertise and confidence in using the technology, but also in some cases to develop skills in new ways of working with learners. Rapid implementation and preoccupation with issues of organization and financial matters among districts did not always leave sufficient time to attend to these needs.

Besides expertise, enthusiasm of staff was an important component that Hough (1992) identified in successful consortia. Enthusiasm was generated by key people like the consortia coordinator, the in-school coordinators, the teacher advisors, and the clerical assistants involved in the overall operation of the distance delivery system.

Following are suggestions from Alberta's consortia for assisting teaching staffs to become involved in and enthusiastic about distance education programs:

1. *Allow time for teacher change.* Any professionals' process of changing practice or adopting new ideas is lengthy, circuitous, holistic, and complex (Baskett and Marsick, 1992). It sometimes involves transformation in emotions,

relationships, personal growth and sense of self, as well as rational understandings and cognitive changes. Teachers are often careful to conserve their best practice, and so resist pressure to change without thoughtful consideration of the relative benefits of new ideas for their students. When teachers acting thus cautiously towards innovation are viewed by consortia planners or administrators as being simply negative in attitude towards distance education, generally resistant to change, or "traditional" in their practice, the result.

2. *Recognize that teacher change is internal.* Change cannot be imposed externally. Professionals change when they decide that there is good reason to do so, and that they would have sufficient support to justify the risk. External agents can be helpful in creating awareness of the need for change and the motivation to act on that need, then guiding and supporting the change process. Alberta's example indicates that involvement of teachers in various roles related to functions of the distance education consortia must be invited, not compelled.

3. *Attend to teacher diversity.* Teachers in various districts are characterized by significant differences that will affect the growth of the distance education programs and the general development of the consortia.

- teaching experiences: students taught, curricula used, exposure to technology, experience with implementing change.
- competing values and beliefs related to conceptions of the role of teacher, the nature of curriculum, the essence of what it means to learn, understandings of students and basic pedagogy.
- teaching styles and strategies.
- teachers' own learning styles.

- attitudes and understandings about the meaning and importance of technology in instruction, as well as its possibilities and limitations.
- school contexts: professional expertise available in various areas, school culture and policy, language, instructional resources and programs, collegial relationships, social practices, parental expectations and local community values.

4. *Integrate-in-context.* Educational change occurs more rapidly and lasts longer when new resources and program initiatives are integrally linked with teachers' on-going curriculum implementation, rather than being treated as an "add-on" component to an overcrowded program. New initiatives also must be integrated with each school's goals and priorities for change. This has implications for administrative responsibilities and district support through resource allocation, policy-making, and distribution of staff.

5. *Develop mentoring networks .* Change in a large group of teachers is often accomplished by focusing development efforts on small teams of "early adopters", teachers who are committed to the innovation, located in a limited number of schools. These groups are nurtured and supported, sustaining their cohesion and helping them extend their vision to others, until they reach a "critical mass". On-going substantive support is crucial. This approach is in contrast to targeting large groups of teachers in a large "spray and pray" attempt to deliver information about an innovation, or the "cascade" approach where a representative plus one supporter from each school or district is "trained" and then expected to catalyse change in a particular geographic area.

6. *Recognize and accommodate the milieu with respect to educators .* No change effort can consider itself neutral, operating in an apolitical, decontextualized vacuum. Professional development must acknowledge its place within the unique

political and educational milieu of its community, where broad changes are unfolding that teachers and schools are currently struggling to understand and work within:

- Reduced resources in schools: materials, equipment, staff, teacher and administrative time, and consultant expertise available to assist teachers implement a variety of recent changes in curriculum and educational policy .
- Teachers' perceived public demands for greater accountability, emphasis on measurable outcomes, and increased use of technology in schools
- Increased teacher workloads, teacher stress due to many new program and school structural changes, and teacher anxiety resulting from staffing changes.

Demands for New Kinds of Leadership

Appoint a central consortia coordinator with meaningful authority.

Hough (1992) found that the effectiveness of a school district's consortium operation was related not to the organization and management structure, but to the "empowerment of a coordinator" (p. 347). That is, a coordinator needs the power and flexibility to make decisions and act on them quickly. The coordinator or director needs to be given resources, organizational support, and most importantly, time. The more distance that separates the cooperating institutions, the more time is required to coordinate them. Hough concluded that the consortium coordinator should be a full-time appointment, especially in the first two years of establishing the consortium. Grupe (1971) agrees that this crucial start-up and implementation stage takes two to three years. McKenna (1976) also found that a full-time leader "is

essential...depending upon the extent and complexity of a consortium's activities" (p. 26). Haughey and Fenwick (1994) found that superintendents in Alberta tended to believe that a strong individual leader was the key to a consortium's success. One superintendent claimed:

I would attribute [the consortium's success] to the consortium coordinator. We have an individual who is highly committed and is very attentive to the details of the operation, very responsive, and is very capable effecting changes whenever these are necessary. If you put all those elements together and if you find them in a single individual, then I believe you have the recipe for success.

The coordinator assumes a variety of operational responsibilities. One of the most important responsibilities is to monitor costs and review fee structures to eliminate inequities that exist. McKenna (1976) outlines two main leadership qualities for this director to ensure the success of the consortium: (1) "entrepreneurial leadership", and (2) "authority based on the power of suggestion and persuasion -- quite different from the traditional hierarchical leadership" (p. 26). The sorts of entrepreneurial activities engaged in by a director that McKenna observed to be helpful to a consortium were imaginative and innovative, and often promotional. Effective directors first must develop lines of communication and cooperation with all participating institutions. They must justify the existence and survival of the consortium by producing evidence of financial savings. They might develop the consortia's willingness to work in untested areas. They might help modify the educational structures to extend educational opportunities for more students.

In Alberta's Big Sky consortium, the coordinator was trusted by all participating districts, and thus was granted reasonably wide latitude in decision-making. The individual reportedly spend considerable amounts of time fostering communication among the districts, and among the staff within the districts. Besides managing the buying/selling of course credits, the coordinator devoted much energy to "trouble-shooting" activities as issues arose.

In Hough's (1992) study of Alberta's consortia, the consortium coordinators typically described their most important role as one of "selling" the innovation to teachers and administrators, certain students and parents, and sometimes to school boards. Principals have particular issues and concerns related to distance education, and the coordinator needs to establish good working relationships with principals. Hough (1992) suggests that the coordinator should spend time with principals helping them make sense of the new distance education programs and their role in the process of implementing distance education in their schools, take leadership of the distance education initiatives in their school, find ways to relieve this extra "burden" (p. 301), and convince them of the need for distance education in their school and the benefits it offers their students. In particular, principals need to be convinced to use distance education to fill a need in their schools, not just to acquire resources. The coordinator also might help mediate relations between principals and the tutor-markers.

Inviting school principals into meaningful involvement

Consortia members in Gonnet's study (1991) agreed that school principals should have more control delegated to them, and have a greater input in identifying problem areas and discussing procedures in consortia operation. Not only will principals be more likely to be supportive of the distance education

initiatives when they are involved meaningfully in decision-making, but they also represent a crucial source of understanding of staff and student needs for the consortium. Specifically, principals in a school district should be invited to:

- provide input into solutions of these problems
- develop policies and procedures that directly affect students , especially in the area of evaluation
- create an environment that facilitates student learning and delivery of distance education in the school

In particular, principals need to have input into developing guidelines for their particular areas of responsibility: registering students, reporting student achievement, determining course loads, programming, monitoring course completion, and timetabling.

Creating Clarity

Develop a clear and specific consortium agreement

Hough (1992) found that a comprehensive partnership agreement is essential for the effective development of a consortium. The agreement should spell out clearly the financial arrangements governing the receiving and delivering of distance learning course credits among participating institutions. McKenna (1976) lists four procedures that she found needed to be specified in post-secondary consortia agreements:

1. Joining or withdrawing from membership or disbanding it

2. Determining the details for funding arrangements as in amounts to be collected, manner of collection, holding of funds, and disbursement.
3. The basis for representation -- which institutions may join, by whom they shall be represented and the number of representatives
4. Governance. Will the consortium be guided by an executive board, chairman, etc.?

Hough felt this list was acceptable as a starting point for consortium agreements among school districts, but adds four elements he found to be essential after studying Alberta's distance education consortia:

5. A mission statement, or some statement detailing what the consortium is expected to accomplish
6. Operational details of the consortium
7. Consortium coordinator's responsibilities, role, and conditions of employment
8. Tutor-marker's responsibilities, role, and conditions of employment.

Members of Alberta distance learning consortia also felt that day-to-day operations needed to be specified, indicating the entrenchment of school districts in a frame desiring control, prediction, and standardization with little variability. Alberta's distance learning consortia found that constructing a consortium agreement typically takes more time than anticipated.

Develop policies carefully and communicate them clearly.

Many of Alberta's districts found that lack of foreplanning necessitated hurried policy-making to meet contingencies, which resulted in confusion about what procedures actually existed. District representatives expressed their wish that more time had been set aside for careful up-front planning. The lesson seems to be, don't rush implementation of the distance education courses under a consortia umbrella before materials, guidelines, procedures, roles and responsibilities are in place. One area of joint responsibility in the consortia that caused particular concern among member districts was the need for an accurate, central student registry for tracking and reporting student progress. Alberta's example demonstrates the need for procedures to establish this registry early and maintain it efficiently. Gonnet (1991) recommends that a policy handbook, clearly spelling out these and other procedures to govern all operations shared by districts, should be made available to all participating districts. Policies should be assembled, notes Gonnet, using input from those stakeholders most affected by the policies.

Balancing Control and Commitment

Create interdependent structures

Despite the loss of district autonomy reported in many Alberta consortia, it appears that sometimes a structure can be established which helps secure the individual districts' autonomy. In Alberta's CEDEC example, each participating jurisdiction in the consortium developed its own policies. While this practice helped preserve local autonomy, individual districts often reached the same decisions creating duplication of tasks and responsibilities. Districts also produced different understandings and directions, requiring careful coordination, planning, and communication to mediate among them.

Gonnet (1991) compares this particular consortium structure to that of a crystal. There are clear lines of "bonding", the pattern of bonding determines the crystal's appearance, each element is distinctly separate yet integrated into the total structure, and the structure splits along predictable lines of cleavage when lines of bonding are broken (p. 73). The organization of the consortium was not pre-determined, but allowed to evolve.

Three principles appeared to govern the process of balancing control and commitment of districts in a consortium. First, meaningful involvement of all member jurisdictions must be encouraged, so that districts are supplying services as well as purchasing courses. Second, members were linked through interdependency and a "loosely coupled" structure, in favor of more "traditional" hierarchical organizational models. Whether member districts each preserved their own identity and individuality within the consortia, or whether they surrendered a fair amount of their own autonomy to the consortia management, they perceived their relationships with other districts to be mutually dependent. Third, in the most effective consortia, accountability was delegated to levels where it had the greatest impact, creating more local autonomy and involvement of staff at lower levels taking responsibility and making decisions.

Maintain frequent and open communication.

Districts that reported the greatest satisfaction with their consortium emphasized the need to maintain open communication lines even when the pressure was on to "operationalize" (presumably meaning districts made time to think and talk even when pressured to "act now and reflect later"). Extensive discussion was fostered, to help resolve differences and coordinate efforts.

It is ironic that staff involved in the mechanisms of distance education consortia, relying largely on audio-conferencing, fax, and other technologically-mediated communications, would insist on face-to-face communication as the most effective way to establish and maintain open dialogue among consortia members. However, teachers, administrators and distance education coordinators did identify a wish for more opportunity to share experiences and sort through problems in conversations with other consortia staff members.

The most successful consortia in Alberta were characterized by regular interpersonal dialogue among staff, school-based administrators, and central office representatives of different member districts. "Open" and positive communication among constituents with differing perspectives, power relations, and philosophies is usually recognized to be a crucial component in establishing effective working relations especially in a collaborative venture. However, authentically open dialogue is often not acknowledged as the complex and multi-layered phenomenon that unfolds only through careful balancing of "inquiry and advocacy" (Senge, 1990). Consortia that were described as having achieved regular, open communication among their members appeared to share three key elements:

1. a consortium coordinator with strong interpersonal skills, who committed much time and energy to communication with various district administrators and staff,
2. frequent conversations involving all districts (although some superintendents were concerned about the amount of time required for these meetings), and

3. commitment to a central vision for the consortia, willingness to relinquish a certain amount of control, and appreciation for the positions of other district members in the consortium.

LaRocque and Coleman (1993) show that collaboration among school districts does not mean the same thing as consensus. Rather, the most effective partnerships occur when district representatives focus on balancing two parts of "open" communication: (1) listening to one another and genuinely trying to understand each others' perspectives, and (2) taking the necessary care and time to articulate their own meanings, including their objectives and opinions and the reasons for these, as authentically and clearly as possible.

Question 4: Do the advantages offered by a consortium, in terms of enhancing student learning at a distance, outweigh the disadvantages?

Any consortium among school districts creates a new level of bureaucratic complexity to a system already complex in structure. Greater complexity in an organization, according to Elmore (1983), results in more bureaucrats who must signoff the implementation of a decision, more difficulty following lines of responsibility to staff, more actors, and more transactions among actors to accomplish a task.

After comparing the northern Ontario consortia model to other distance learning consortias in Newfoundland, Louisiana, New York State, Pennsylvania, and Alberta, McGreal and Simand (1992) conclude that agreements between local school boards severely limit the educational possibilities of distance education. They recommend centralization as a way to

minimize local differences in levels of expertise and increase the ability to deliver courses. They also suggest that centralization will help equalize educational services, as well as help mediate different educational philosophies among schools and their boards.

This paper presents an alternate view. Despite its attendant difficulties, decentralized consortia have been shown to be very successful in a variety of contexts. Decentralized does not mean disorganized, and these consortia are especially successful when they are carefully planned and organized and when time is taken to foster effective communication among member districts. To ensure the success of a collaborative organization of institutions, Konrad and Small (1989) emphasize the importance of "appropriate structural arrangements" that "reflect the 'ownership' of all participants and ... maximize responsiveness to emerging opportunities" (p. 199). For an effective consortia to develop, Konrad and Small conclude, educational institutions "must move away from a posture of independence and isolationism toward a commitment to interdependence and cooperation" (p. 201).

Hough's (1992) study of Alberta distance education consortia found that, in the case of jurisdictions with three or fewer schools participating in distance education, joining the consortium offered significant enough financial benefits and provided enough valuable service to justify a certain loss of autonomy and freedom. School jurisdictions deciding to join a consortium must be prepared to surrender some autonomy if they are to implement and maintain successful distance education partnerships. However, for those jurisdictions with enough expertise and funds in their own schools to provide tutor markers and where schools were relatively close in distance, joining a consortium was not an attractive option. These jurisdictions formed their own mini-consortia within the district, and ran them

successfully and happily. The lesson here appears to be that each jurisdiction should be provided time, information, and opportunity to assess its own needs and priorities before making the decision to join a consortium.

In 1993, a sample of Alberta school superintendents were interviewed to explore their attitudes about the value of consortia (Fenwick and Haughey, 1994). In districts which opted not to participate in a consortium, superintendents often argued that the cost of membership and course purchase didn't justify the specialist teacher services made available through the consortium. The time involved, which included meetings to work out details of the collaborative agreement, make operational and policy decisions, and maintain a cooperative relationship with other districts by "smoothing out the personality differences, that sort of thing," was felt by many to be a key disadvantage of membership in a consortium. Several referred to the difficulties of striking an equitable agreement with other jurisdictions when those jurisdictions are governed by different agendas and philosophies regarding distance education.

In this 1994 study, an equal numbers of those respondents surveyed strongly agreed as disagreed that consortia were an appropriate way for their districts to facilitate distance education. Responses differed widely. Some of the differences centered on the variety of feelings about tutor-marker arrangements and contracts, sharing resources among jurisdictions, and the administrative structures of distance education consortia. Superintendents who were pleased with their consortia operations and management named four reasons for their satisfaction:

1. on-going positive interpersonal communication among superintendents of member districts,

2. a strong consortia director or coordinator (committed, enthusiastic, attentive to operational details, and skilled in communicating, initiating, and promoting),
3. responsive, helpful assistance with problem-solving by Alberta Education and the consortia coordinator
4. a sense of receiving fair value (in teacher specialist services from other districts) for their investment.

The answer to the question "Do the advantages of membership in a consortium outweigh the disadvantages?" depends on who is doing the asking. Districts must decide what their priorities are, what structures and controls they are willing to give up or modify, what level of ambiguity and uncertainty they can tolerate, and what they view as an effective organization.

Final Reflections

The issues described in this paper of course are named as issues within a particular structuralist frame of viewing, established by the existing reports describing these consortia (Hough, 1992, Clark and Haughey, 1990, and Gonnet, 1991). These perspectives reflect a prevalent and rather traditional structuralist orientation to the notion of collaboration. From this orientation issues and advantages of consortia are typically viewed as management concerns. The flow of tasks, information, and ultimately of learning itself are framed by a linear "conduit" metaphor. Delivery of distance education becomes preoccupied with issues of coordination, efficiency, creating top-down policies to regulate behavior, avoiding

duplication, protecting territory, clarifying lines of responsibility, and equalizing power.

Issues of colliding values and beliefs, pedagogical rethinking, or community building do not seem to surface. Neither does there appear, in discussions of whether to consort or not to consort, to be much focus on the influence of organizational structures, collaborative or otherwise, on what should be the primary concern: the learning of the students. (Although Haughey and Fenwick (1994) report that superintendents appeared to be very concerned with the experiences of the distance education students). Either such issues are ignored or undetected in the unfolding process of a new consortium or the shape and structure of member institutions are left sufficiently intact by the existence of a consortia that they are neither compelled nor motivated to undergo significant organizational change.

Moore (1993) makes an elegant case for the need to liberate distance education's potential by making radical changes in educational organization. Unless distance educators learn to "think big," Moore believes the result will be continued frustration, overworked staff, under achievement of learners, and missed opportunity to maximize technology to truly revolutionize education. He envisions institutions working cooperatively, such as forming consortia, to re-design themselves as new systems organized as a network of people integrally linked to a whole. Moore envisions consortia linking various people from industry, business, higher education, public services, voluntary and non-profit sectors, and schools in various places acting at various times as (a) Sources of Knowledge, (b) Structures of Knowledge - (instructional designers and course developers), (c) Facilitators of Interaction, and as (d) Learners, all enabled by the communication media.

But, currently, little evidence exists that a consortium in practice actually affects the organizational structures of its member institutions in ways that Moore believes it should. Nor does the Alberta experience indicate that new ways of school districts working and learning together collaboratively are generated by the formation of consortia, either in sharing ideas, opening new lines of dialogue between institutions, or in bringing together multiple points of view that can interrupt each other's accustomed patterns of reasoning or challenge each other's assumptions and beliefs. The potential for critical reflection, innovative restructuring, and changed relationships might exist; and, it might be offered by shaping a new organization out of school districts called a consortium. However, in reality consortia are formed from educational systems for the purpose of delivering distance education are typically incorporated into the existing bureaucratic structures.

Greater organizational change may be possible when districts are open to relinquishing greater amounts of control to the consortium body, allowing their own structure to melt and shift to accommodate the evolution of the consortium organism. For example, Reddington (1984) describes the distance learning consortia of the post-secondary Knowledge Network in BC. as a "partnership" model. In this "partnership" model, the consortium creates an independent unit representing all its constituents and empowered by its members to act with a great deal of proactivity and freedom from the constraints of the members' agendas. This distance learning consortium unit acts in three ways:

1. catalyst (promoting understanding and use of distance learning among potential users),

2. facilitator (promoting equal rights and responsibilities among members to both make decisions and to act), and

3. enabler (creating links with government and other institutions to procure resources and services, and lobbying in political arenas for support).

Once consortia members have granted this degree of power to an independent unit that represents them all, the possibilities for new ways of relating and working collaboratively may be within reach. For instance, why do consortia not actively encourage teacher tutor-markers (often isolated in various districts) to share and legitimize their experiences, collaborate to make sense of this new way of working with students, jointly work out issues and share strategies as they discover these? Why are consortia not pressed to function as catalysts of critical thinking, bringing together multiple perspectives to challenge districts' taken-for-granted ways of operating?

Superintendents with particular views can be assisted to confront each others' different beliefs about the nature of learning, and different possibilities offered by courses structured for delivery at a distance. Teachers used to working with students and parents in a particular way in a particular community, and familiar with a particular understanding of education as it is structured within their district, have the opportunity through consortia for exposure to new possibilities as they work not only with the unique instructional systems and time-space conceptualizations of distance education, but also work with teachers and students living in different community and district educational cultures, and in particular, look at how these different folks make sense of the innovation of distance education within their own contexts and contrast these with their ways of implementing the programs.

The formation of a consortia also could create a unified, more powerful voice for school districts. Such a voice can be effective in lobbying government for policy changes and funding, in the way Reddington (19**) and Sofo (1990) suggest. As well, a single coherent "face" in the community can be powerful in promoting distance education among parents and students.

A consortia can also function to support experimentation and risk-taking with new technology and ways of delivering distance education among member districts. It can spearhead the development of new materials, promote mini-pilots of new innovative ways of integrating technology into instruction across schools and districts, bring together teachers at a distance to create new programs, and sponsor teacher inservice, linking teachers across distances with each other and with other resources.

The existence of a consortium offers all these possibilities of exchanging discoveries and sharing views. Such conditions are bases for learning, growth and change promoted by the purveyors of the "learning organization" concept (Senge, 1990). Why don't school districts participating in a consortium take advantage of these possibilities? This is a key question emerging in an examination of distance education consortia, and deserves exploration through further research.

Conclusion

Consortia, especially school district consortia, are more difficult to organize and run successfully than perhaps might appear. The three Alberta distance education consortia described in this paper highlight many of the issues and problems that need to be confronted when attempting to foster collaboration among school districts. However, the three examples also show that a consortium offers significant advantages for a school districts delivering distance education. Chief

benefits are cost-savings and access to teacher specialists. Issues of note are generated by new staff roles and greater staff workloads created by the existence of the consortium, the need for new kinds of leadership, the power issues attending the integration of these new leaders into existing management structures, districts' discomfort with unclear financial and operational agreements, and districts' reluctance to surrender control and autonomy. These issues were found to be consonant with literature examining consortia, although much of the existing theory and research focuses on post-secondary distance education consortia.

Any "lessons" offered by particular examples of consortia must be studied with careful attention paid to context. With this caveat, however, an analysis of the Alberta examples suggests eight guidelines that might prove helpful for other school districts exploring the possibilities of forming a consortia to deliver distance education:

(The following guidelines have been collapsed from the foregoing discussion, and arranged in a sequence reflecting what appears to be most important from the districts' perspective.)

1. Establish among all consortia representatives an atmosphere where frequent and open dialogue is expected and where *appreciation* of others' points of view, not consensus, is the focus. Work at surfacing and listening to partisan district interests and concerns related to the consortia agreement, operations, and directions.
2. Appoint a full-time leader for the consortia who is granted meaningful authority and has reasonable independence in making decisions and facilitating directions for the consortia.

3. Develop, with involvement of principals and superintendents, a clear and specific consortia agreement which spells out financial arrangements, policies, and operational procedures. Communicate the details of the agreement clearly to all staff involved in programs managed by the consortia.

4. Develop clear role descriptions to guide consistent expectations and working conditions for new staff responsibilities created by distance education consortia.

5. Provide support (including information, timely assistance, and encouragement) for staff, especially teachers, undergoing the change process produced by establishing a consortia.

6. Delegate authority for local decision-making to principals and assist administrators to adjust to the new operations and management structures created by the consortium.

7. Allow sufficient time for planning the consortia operation and developing the consortia agreement.

8. Budget for extra personnel and staff time required to cope with the increased workloads produced by consortium operation.

The distance education consortia in Alberta at the time of writing are still in relatively early stages of development. It is evident through the issues described in this paper that while some concerns are being worked through others are still emerging. Half of the district superintendents interviewed by Fenwick and Haughey (1994) felt that benefits of a consortium outweighed these concerns. Some were as enthusiastic as the following senior administrator:

On a scale of one to ten, in terms of how we feel about the effectiveness of the consortium and the service that we are getting from it, we'd have to rate it a nine plus. . . . Our questions are usually answered with great rapidity, responses are very efficient and effective . . . we just haven't had any areas of concern.

However, the split support for the idea of consortia among superintendents indicates that a consortium is not an appropriate model for all situations, even when attempts have been made to establish open communication, clear agreements, and strong leadership.

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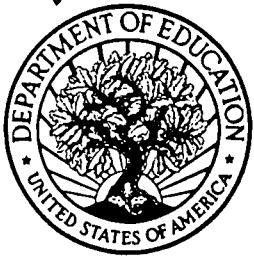
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