

The Distance Learning Leader: What You Don't Know Could Hurt You

Tom Land and Tony Bright

INTRODUCTION

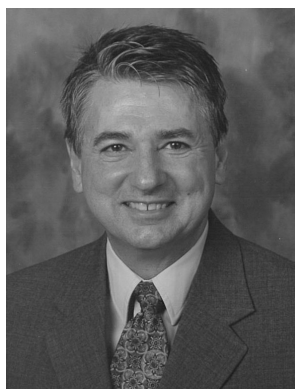
In many ways, it is the best and worst of times for distance learning (DL) programs. It is estimated the e-learning sector will grow to \$83.1 billion by 2006, eventually swelling to over \$212 billion by 2011 (Greenspan, 2003). This is

evidenced by the meteoric rise of such DL pioneers as the University of Phoenix, as the nation's largest private university, with close to 100,000 students scattered among 134 satellite locations across 28 states. Unfortunately, the increased growth and popularity of DL pro-

grams is not without risks, as reflected by abandoned university online ventures such as E-Cornell, Virtual Temple, NYU Online, Fathom, E-MBA, and California Virtual University. Despite these risks, the growing widespread acceptance of DL programs by the public, argues for the continued development of this facet of collegiate level instruction (Edelson, 2002).

In order to succeed in this new environment, organizations must continually acquire new skills and new ways of managing knowledge and information; this requires DL leaders to be entrepreneurial while navigating the risks of new educational technology. DL leaders must go beyond distance education (DE) technology to develop their vision, strategy, and business plan to guide their organization into the age of e-learning.

John Flores, Executive Director of the United States Distance Learning Association (USDLA), recognized the need for leadership capacity building in DL and engaged Nova Southeastern University's Fischler School of Education and Human Services to create a competency-based leadership program for



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DL leaders. The purpose of this article is to describe a needs analysis developed to identify the duties and responsibilities of DL leaders and a Distance Learning Leadership Certificate Program developed to address these competencies.

REVIEW OF THE LITERATURE

It could be argued that the most important ingredient for a successful DL program is the vision and approach developed by the DL leader and how well this approach aligns to the organizational strategy. Meister (2002) posited that one of the pillars of e-learning success is for corporate learning practitioners to ensure that their staffs have the necessary e-learning skills and competencies. Edelson (2002) supported this notion when he suggested that the success of higher education institutions in the e-learning world is based on their infusion of DE leadership strategies such as creating a vision and embracing an entrepreneurial organizational spirit. Likewise, the Commission on Technology and Adult Learning (2001) recommended that, in order to succeed in the e-learning arena, individuals and organizations must continually acquire new skills and ways of managing knowledge and information. Despite this, Thach

(1994) recognized the scant attention given to research on DL competencies, let alone research targeted to DL leaders. It is surprising then, given the importance of leadership to the success of DL programs, how little research and programs exists to build leadership capacity. Williams (2003) noted institutions implementing DE programs would benefit from research defining necessary roles and competencies. Limiting his research to higher education, Williams utilized a Delphi study to identify 13 distinct roles and competencies to manage DE. In his study, the role of the leader/change agent emerged separate from the administrative manager role. Building on the foundation established by Williams, the rationale for the current study was based on the need to further identify skills and competencies of DL leaders in higher education.

METHODOLOGY

This study used the DACUM process, a quick, cost-efficient job analysis method used to identify DL leader competencies that "expert workers" believe are essential for performing a specific job or occupation. Initially, a focus group was conducted with six DL leaders representing both corporate and higher education settings. The criteria for

expert workers included a self-rating of level of expertise as a DL leader, five or more years of experience, and current employment (in some capacity) as a DL leader. The group defined a DL leader as "responsible for leading the distance learning/e-learning initiative in their organization." The DL Leader Job Model was then validated by 27 DL leaders who were members of the United States Distance Learning Association (USDLA) representing a cross section of K-12, higher education, and corporate settings.

The DL Leader Job Model Online Validation Survey contained 91 questions divided into three sections. Section one asked about demographics and backgrounds of the respondents. Section two included a scale requiring respondents to rate job task importance of a DL leader as well as value of training in major duties and tasks. Similarly, in section three respondents rated specific skill and knowledge competencies of a DL leader.

RESULTS

SECTION ONE: BACKGROUND OF THE RESPONDENTS

Of the 27 respondents, 50% had doctorates, 42% had master's degrees, and 8% had bachelors

Table 1
Table Major Duties and Competencies of a Distance Learning Leader

DUTIES	SKILLS/KNOWLEDGE COMPETENCIES
Develop DL Business Strategy	Foundations of DL
Provide DL Leadership	DL Technologies
Manage DL Organization	DL Tools and Technologies
Manage DL Budget	DL Curriculum and Instruction
Promote DL	DL Leadership
Provide DL Technology Leadership	
Oversee DL Curriculum	
Manage Development of Student/Learner DL Services	

Table 2
Table Major Tasks of a Distance Learning Leader

DEVELOP DL BUSINESS STRATEGY	PROVIDE DL TECHNOLOGY LEADERSHIP
1. Complete environmental scan to assess DL Program needs 2. Develop the business case for DL 3. Identify DL key success factors 4. Develop long/short term operational plan 5. Implement plan 6. Manage DL projects 7. Communicate DL strategy to stakeholders 8. Update stakeholders on DL implementation progress and issues	1. Identify DL infrastructure system requirements 2. Develop a systems integration plan for required DL hardware, software, multimedia, and collaborative technologies 3. Inform leaders on DL access and technical competence requirements 4. Develop DL Web site marketing strategy 5. Develop promotional materials 6. Explain DL systems functionality to stakeholders 7. Maintain liaison with internal (IT and Media) and External (Vendors) on DL 8. Integrate DL with organization's knowledge management strategy 9. Explore new DL delivery methods 10. Maintain system requirements documentation 11. Comply with DL industry standards 12. Create plan to keep technology infrastructure current
PROVIDE DL LEADERSHIP	OVERSEE DL CURRICULUM
1. Develop a DL vision for organization 2. Assess the readiness of organization for DL 3. Implement change management plan to transition organization to DL 4. Establish and promote internal and external DL collaborators 5. Benchmark best practices in DL 6. Promote innovative DL methodologies 7. Model ethical behavior and comply with copyright laws	1. Develop plan to infuse technology across curriculum 2. Implement DL course design process 3. Provide technical, design, and production support to faculty/instructors in DL course design and delivery 4. Integrate blending DL technologies with conventional learning 5. Program manage DL course design projects
MANAGE DL ORGANIZATION	MANAGE DEVELOPMENT OF STUDENT/LEARNER DL SERVICES
1. Develop DL organization structure 2. Determine DL staffing requirements 3. Recruit Staff 4. Hire DL staff 5. Manage team 6. Project manage and monitor DL suppliers and partners 7. Develop staff	1. Identify DL student/learner service requirements (e.g. advising, registering, library, financial aid, bookstore services) 2. Develop DL service plan 3. Coordinate with student service providers to ensure that DL students are aware of and receive same level of services as traditional students 4. Provide resources to develop services 5. Assess student/learner services
MANAGE DL BUDGET	
1. Develop DL financial model 2. Identify DL capital requirements 3. Monitor and revenue performance to budget plan 4. Adjust financial plans to meet budget goals 5. Demonstrate return on investment	
PROMOTE DL	
1. Develop marketing plan 2. Promote DL concept to administrators and faculty/instructors 3. Inform leaders on DL access and technical competence requirements 4. Develop DL Web site marketing strategy 5. Develop DL promotional materials	

degrees. Most respondents described their expertise as a DL leader as high or very high. The respondents were employed in Fortune 500 companies, federal government, K-12, financial services, health care, and higher education. Most of the respondents had more than five years experience with ten years experience as the average.

SECTION TWO: DISTANCE LEARNING LEADER JOB MODEL AND RELATED SKILLS/KNOWLEDGE COMPETENCIES.

Three questions were addressed in this section:

Question 1: What are the major duties and responsibilities of the DL leader?

Question 2: How do DL leader experts rank the most important tasks and the value of training?

Question 3: How do the DL leader experts rank the most important knowledge and skills?

QUESTION 1: WHAT ARE THE MAJOR DUTIES AND RESPONSIBILITIES OF THE DL LEADER?

The DACUM panel identified eight major duties and five skill/knowledge competency areas for the DL leader (see Table 1). The eight major duties are a combination of leadership and managerial duties including: leading and developing the business, technology, and curriculum strategies, managing the organization, budget, marketing/promoting and managing support services. The five skill/knowledge competencies included the foundational knowledge of DL, learning delivery technologies, tools and learning management technologies, and reiterated DL leadership.

For each of the eight duties,

respondents identified from 5 to 12 major tasks (see Table 2).

For each of the skills/knowledge competencies there were three to six domains identified by respondents (See Table 3)

Quantitative methods were employed for questions two and three. For question two, respondents were asked to rank the importance of specific job tasks and training value as related to their role as a DL leader. Similarly, in question three, the importance of specific competencies and training value related to job performance were ranked. Importance levels and training values were ranked on a four-point scale that included, 4 = Critical, 3 = High, 2 = Moderate, and 1 = Low. To clarify terminology, the following definitions were provided to respondents prior to ranking the competencies:

- Competency is an underlying characteristic (knowledge, skills, and traits) of an individual that is causally related to effective performance in a job.
- Knowledge is data, information, or concepts that you have in your head in order to perform the task. This knowledge may be used actively in carrying out the tasks, or could be background information that helps you get started.
- Skills are abilities that you have to be able to demonstrate in performing the task. These differ from knowledge items mainly in that they usually involve doing rather than just knowing.
- Tasks are underlying parts of your personality that are consistent responses to situations and information that task performance relies on (Spencer & Spencer, 1993).

To identify which task and competencies were deemed most important and had the highest training

value, Means and Standard Deviations were calculated; results revealed a Mean of 3.1 and Standard Deviation of .3. A task was rated as “most important” if the overall ranking was 3.4 or higher for both importance and value of training.

QUESTION 2: HOW DO DL LEADER EXPERTS RANK THE MOST IMPORTANT TASKS AND THE VALUE OF TRAINING?

DL leaders ranked those tasks aligned to executing their DL strategy as the highest and most important tasks (see Table 4), including: implementing DL plans, managing projects, managing the team, and monitoring costs. Leadership behaviors, including ethical modeling, visioning, and innovation, were also ranked high, but lower than “hands-on make it happen” approach. Support and technology integration plans, though critically important to the success of DL programs, were ranked lower. Interestingly, several DL programs have been derailed because of shortcomings in these areas.

QUESTION 3: HOW DO THE DL LEADER EXPERTS RANK THE MOST IMPORTANT KNOWLEDGE AND SKILLS?

The highest-ranked skills and knowledge competencies of DL leaders were related to content, and included: copyright, design, and learner differences. Ranked slightly lower, leadership competencies of developing a vision and championing DL in the organization are also highly valued. The highest-ranked skills and knowledge competencies and training values are presented in Table 5.

Table 3
Table DL Leader Major Skills and Competencies

FOUNDATIONS OF DL
1. Definitions of DE
2. History of DE
3. Theories of DE
4. Research in DE
DL LEARNING TECHNOLOGIES
1. Self-directed Web-based training
2. Facilitated Web-based training
3. Web-conducted classroom course
4. Discussion group seminars
5. Telementoring and e-coaching
6. Videoconferencing
DL TOOLS AND TECHNOLOGIES
1. DE software knowledge (e.g. Dreamweaver, Flash)
2. Understanding of video, audio, and post-production
3. Understanding of Learning Management Systems (LMS) (e.g. Docent, Pathlore)
4. Understanding of Content Management Systems (CMS)
5. Course authoring programs
6. Webpage authoring programs
DL CURRICULUM AND INSTRUCTION
1. Instructional and curriculum differences for distance and traditional education
2. Unique learning requirements of the distant learner
3. Copyright and fair use guidelines in DE
4. Effective design of DL materials
DL LEADERSHIP
1. Develop a DL vision
2. Champion DE
3. Partner and form alliances with other DE businesses and educators

THE DISTANCE LEARNING LEADER CERTIFICATE PROGRAM (DLLCP)

With the initial step of defining and validating the Distance Learning Leader Job Model as well as identifying the most important tasks and duties and their associated competencies, Dr. Michael Simonson, Program Professor of Instructional Technology and Distance Education, led a design team to develop an instructional strategy for certifica-

tion of DL leaders. The team developed the K-D-M-L-V Distance Learning Leader Model to address specific tasks and competencies. This model includes the following five competencies: (1) **Knowing**, (2) **Designing**, (3) **Managing**, (4) **Leading**, and (5) **Visioning**. Competencies and outcomes are presented in Table 6.

The DLLCP is designed for professionals in a wide range of positions including chief learning

officers, higher education/university DE directors, training directors and managers, educational technology directors, and teachers who are currently leading or interested in being a leader of DL program.

INSTRUCTIONAL STRATEGIES

The program combines two full days of face-to-face instruction and six weeks of part-time distance instruction. Distance instruction

Table 4
Table Most Important DL Leader Tasks

DL Leader Tasks	Importance / Training Value
1. Manage DL projects	3.7/3.6
2. Implement plan	3.7/3.5
3. Develop DL vision	3.6/3.4
4. Develop organizational structure	3.7/3.3
5. Manage DL team	3.7/3.3
6. Develop long/short term operational DL plan	3.6/3.6
7. Role model ethical behavior and comply with copyright laws	3.6/3.3
8. Monitor cost and revenue performance	3.6/3.3
9. Promote innovative DL methodologies	3.5/3.4
10. Identify DL key success factors	3.4/3.5
11. Provide instructor/faculty support	3.5/3.4
12. Develop DL financial model	3.5/3.4
13. Implement DL course design process	3.5/3.3
14. Develop technology systems integration plan	3.5/3.2

Table 5
Table Most Important DL Leader Skills and Knowledge Competencies

DL Leader Skills and Knowledge Competencies	Importance / Training Value
1. Copyright and fair use guidelines in DE	3.8/3.6
2. Effective design of distant learning materials	3.8/3.6
3. Unique learning requirements of the distant learner	3.7/3.7
4. Instructional and curriculum differences for distance and traditional education	3.6/3.5
5. Develop a DL vision	3.6/3.2
6. Champion DE	3.5/3.2

Table 6
Table KDMLV Model

DL Leader Competencies and Learning Outcomes
Knowing DE Define and trace the chronology of DE definitions. Understand the terminology used by distance educators. Explain the technologies used for DE—synchronous and asynchronous. Apply appropriate copyright regulations to the practice of DE. Understand and apply the KDMLV model for DE leaders.
Designing DE Explain the U-M-T Approach for designing DE. Name several important instructional design models used in DE. Understand the design structure of DE courses.
Managing DE Explain important activities of the manager of a design team. Discuss the process of managing a distance learning project. Explain the components of a DE policy document. Understand the process of producing a DE policy statement. Discuss the process of working with clients and vendors.
Leading DE Discuss the process of managing people through change. Understand and explain examples of leaders implementing a DE project. Discuss a business view with case studies for leading a DE/training organization.
Visioning DE Understand an approach for and explain case studies of visioning for DE. Discuss distance learning today and tomorrow from a corporate perspective. Explain the characteristics of and a process of developing a vision statement. Write a vision statement for DE.

includes a six week follow-up delivery to on-site instruction including threaded discussion to review business plans, discussion with DE leaders, audio conferencing, and respondent-led presentations of organization vision and business plans.

RESULTS OF PILOT

In February 2004, 27 USDLA member DL leaders attended the ini-

tial pilot in Ft. Lauderdale, Florida. One of the key design considerations for the program was to offer a hybrid design of on-site instruction with online follow-up. This afforded the leaders with an opportunity to network and share ideas across corporate, higher education, and K-12 boundaries. Program benefits of the DL leader certification program recognized by respondents included: cutting-edge DL leadership skills you can use today; ability to com-

municate DL vision and strategy more effectively; interaction with businesses and higher education leaders with a wide range of perspectives and insights; and ensuring learning technology dollars are invested wisely.

CONCLUSION

This article described how the DL Leader Certificate Program was

developed by identifying the most important competencies leaders of DL need for their programs to be successful. Leading DL programs is not for the faint of heart. We are in the early stages of fully realizing the dramatic paradigm shift DL will have on the way education and training programs are delivered. As of yet, there are no standards for leaders of DL programs, yet it is perhaps the most important success factor. More research needs to be conducted in the important area of identifying duties and responsibilities of DL leaders.

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WHAT IS A DISTANCE LEARNING LEADER?

A LEADER IS A VISIONARY CAPABLE OF ACTION WHO GUIDES AN ORGANIZATION'S FUTURE, ITS VISION, MISSION, GOALS, AND OBJECTIVES. THE LEADER GUIDES THE ORGANIZATION AND ITS PEOPLE WHO HAVE FAITH IN THE LEADER, AND HAVE A CLEAR UNDERSTANDING AND ACCEPTANCE OF THE ORGANIZATION'S WORTHWHILE AND SHARED VISION AND GOALS. A DISTANCE LEARNING LEADER HAS COMPETENCE IN KNOWING, DESIGNING, MANAGING, LEADING AND VISIONING DISTANCE EDUCATION.