Strategic Issues in Single- and Dual-mode Distance Education: The Organizational Blending of Two Canadian Distance Universities

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1. Introduction

1.i. Executive Summary

The year 2005 witnessed a dramatic transformation in the provision of open and distance learning (ODL) in Canada. On the one hand, the Télé-université de l'Université du Québec (TÉLUQ) gave up its status as a self-standing, single-mode ODL university within the Université du Québec (UQ) system, and joined the Université du Québec à Montréal (UQAM). On the other hand, the British Columbia Open University (BCOU) was acquired by the University College of the Cariboo (UCC), which in turn became Thompson Rivers University (TRU), the sixth public university in today's British Columbia system. While TÉLUQ's change in status resulted from a process that the institution had itself initiated, the wheels for BCOU's transformation were set in motion by a provincial government decision. As such, and after about 30 years, Canada has moved from boasting three single-mode ODL universities to having only one, Athabasca University.

After reviewing the literature that compares single- and dual-mode ODL universities, this study briefly traces the history of both BCOU and TÉLUQ before seeking to elucidate—primarily from interviews with key personnel and government officials—the factors that led to their demise as single-mode ODL universities. The following areas are examined independently and then compared across both institutions: origin; level of government support; institutional credibility and inter-institutional support; collaboration with other institutions; openness and flexibility; academic programming and quality; enrolment growth patterns; cost-effectiveness; governance model; staffing complement; commitment to research; and leadership.

Some of the major concerns raised by interviewees were common to both organizations: the failure to increase market size in the face of stiff competition

from provincial dual-mode providers; less than optimal support from sister institutions; restricted autonomy and governance models that limited the organizations' strategic planning and operations; difficulties in developing political support from government, elected officials, students, and alumni. Other identified factors were more institution-specific: questionable leadership (BCOU); poor relations with government (BCOU); absence of a core faculty (BCOU); minimal contribution to research (BCOU); and limited programming (TÉLUQ).

Although the future of ODL in both British Columbia and Quebec remains uncertain, the perspectives of the different interviewees, as well as the manner in which ODL has been reconfigured in these jurisdictions, provide a reasonable basis on which to project.

While the open institutional and programmatic characteristics (open admission; low residency; credit coordination/consolidation; credit banking) inherited from BCOU are expected not only to continue to characterize the former BCOU programs, but also to positively impact other TRU programs, several indicators point to the more open aspects of the delivery of distance education courses as practised at BCOU (i.e., uncapped, continuous, and self-paced course registrations) being at risk in the new university. Should this materialize, the distance education component of TRU's open learning model will have much in common with how distance education is practised in traditional dual-mode universities and in single-mode mega-universities: distant but not very open.[1]

In contrast to the UCC acquisition of BCOU, the TÉLUQ annexation to UQAM has certain built-in features that, at least for the foreseeable future, seem to ensure a positive future for all aspects of ODL in Quebec. Key to the new arrangement is the concept of the "university within a university," an original

[1] Mega-universities annually serve, through distance education, at least 100,000 students (Daniel, 1996)

model for protecting the ODL culture in a dual-mode institution, and one that has been enshrined in the protocol agreement (*Protocol for Joining the Télé-université to the Université du Québec à Montréal*, 2004) and its appendix (*Annex to Protocol Agreement*, 2004). However, since the TÉLUQ legislation has been repealed, and as this new organizational model is an internal agreement not referred to in the amended legislation for UQAM (and notwithstanding that the protocol agreement itself requires that both TÉLUQ and UQAM agree to any future changes to the agreement), there is a lingering concern as to whether the new model, and with it the protection of all of TÉLUQ's ODL features, will survive the test of time.

Finally, this study concludes with an examination of the major lessons learned:

- the need for medium-sized ODL institutions to recognize their inherent vulnerability
- the primordial importance of relationships with governments
- the importance of relationship building with other system institutions
- the double-edged-sword nature of inter-institutional collaboration
- the importance of cultivating communities of students and alumni
- the need to ensure that governance structures maximize institutional autonomy, credibility, and flexibility
- the importance of faculty members in gaining recognition as a university
- the importance of increasing market share through product differentiation
- the need to develop and entrench scalable models of program development and delivery
- the importance of leadership

1.ii. Background, Context, and Objectives

In 2005, the provincial governments of British Columbia and Quebec in Canada independently implemented significant and fundamental changes to their post-secondary education systems and in so doing had a direct impact on the provision of distance and open education.

As mentioned earlier, BCOU was acquired by the UCC, a medium-sized regional institution located in Kamloops, and as part of this change UCC became a special-purpose university, Thompson Rivers University. Also as mentioned, TÉLUQ was annexed to UQAM, one of the largest urban-based universities in Quebec. These mergers are particularly significant because BCOU and TÉLUQ were two of three Canadian single-mode, special-purpose distance and open education institutions, and because the mergers resulted in the reframing of the Canadian formal education context.

This study examines the rationales and impact that these unrelated and differently motivated decisions to combine these single-mode institutions with others, and thereby to create two significant dual-mode universities, are likely to have on the short- and longer-term provision of open and distance education in these provinces. These changes also raise questions about the long-term viability of single-mode distance delivery institutions and the lessons to be learned from these mergers. The important policy issues that emerge from these consolidations extend beyond Canada to other countries with developing or mature distance education programs. An understanding of these case studies would assist not only policy and decision makers in governments, but also the operation, decision making, and practices of institutions using both single and dual institutional models of distance education.

Specifically, the study addresses the following questions:

- What were the formally stated and informally held reasons for the decisions of the provincial governments of BC and Quebec to combine

their single-mode distance education universities with campus-based institutions?

- What are the planned and likely unplanned personnel, programming, and administrative costs that have resulted, or are likely to result, from this decision?
- What does the future hold for open and distance learning in these provinces?
- What larger-context lessons can be drawn from these two cases?
- Are these amalgamations evidence of the vulnerability of single-mode institutions as anticipated by Rumble in 1992, and reframed by Rumble and Latchem in 2004?

1.iii. Methodology

While BCOU and TÉLUQ had much in common (both were single-mode distance education providers of primarily undergraduate degrees to adult learners; both offered open admission; and both offered individualized course start dates and pacing), there were also some notable structural differences, both in their formal relationship to their mother organizations (the Open Learning Agency and the Université du Québec, respectively) and in the nature and scope of their mandates. Most important in this respect is the fact that the legislation under which BCOU was established speaks formally of open—not distance—education, a situation that is reversed in the case of TÉLUQ.

While these differences are very important to an understanding of each particular case study, they are considerably outweighed by the similarities in the core business that BCOU and TÉLUQ were engaged in, thereby conceptually justifying the comparative case study methodology.

A literature review of single- and dual-mode models of distance delivery, the author's knowledge of the institutions in question, and a review of the relevant printed documents pertaining to the cases informed the development and validation of the interviewing tool. Original data was collected from interviewees purposively selected on the basis of their expertise and insight into the research questions. The interview sample contained representatives from senior administration, management, academic, and government staff. The interviews were recorded and transcribed. Major themes were extracted from the interviews using general grounded theory analysis techniques, and these findings were complemented with written documentation made available, or publicly accessible.

1.iv. Key Concepts

In order to facilitate the reading and understanding of this study, a few key concepts require clarification.

Open Learning

UNESCO defines open learning as "instructional systems in which many facets of the learning process are under the control of the learner. It attempts to deliver learning opportunities where, when, and how the learner needs them."[2]

While open learning represents a continuum rather than an absolute state, it generally accommodates several of the following characteristics:

- delivery models that respect the learner's needs
- open admission
- uncapped admission and enrolment
- learner choice on program curriculum makeup

[2] http://www.unesco.org/education/educprog/lwf/doc/portfolio/definitions.htm

- accommodation of different learning styles
- recognition of prior formal and non-formal learning
- credit coordination
- low on-site and institution-specific residency requirements
- minimal formal course prerequisites
- continuous enrolment
- self-pacing

Open learning need not be distance learning.

Distance Education

UNESCO defines distance education as "an educational process and system in which all or a significant proportion of the teaching is carried out by someone or something removed in space and time from the learner. Distance education requires structured planning, well-designed courses[,] special instructional techniques and methods of communication by electronic and other technology, as well as specific organizational and administrative arrangements."[3]

All distance learning need not be open learning.

Open and Distance Learning (ODL)

A learning system that combines open learning characteristics with distance delivery.

[3] http://www.unesco.org/education/educprog/lwf/doc/portfolio/definitions.htm

Single-mode Distance Institution

An institution in which teaching, learning, and administrative systems are designed and dedicated to the provision of distance education.

Dual-mode Institution

An institution in which teaching, learning, and administrative systems support both campus-based and distance education.

1.v. The Literature on Single- and Dual-mode ODL

Since the 1980s, when Keegan and Rumble (1982) concluded that an annual volume of 9,000 to 22,000 student enrolments (depending on the mix of media, student support services, and number of courses offered, as well as the cost of conventional education in a particular country) would result in a single-mode distance university being more cost-effective and efficient than its dual-mode counterpart, the vulnerability of the former has attracted considerable attention. Sewart (1986), after juxtaposing the academic advantages of each model, concluded that the decision to opt for the one model over the other was never the result of educational debate but of historical accident and external factors, and that the benefits often attributed to the one approach could equally well be found in the other. In spite of Sewart's questioning the usefulness of further study of this area, Perry and Rumble (1987) refined Keegan and Rumble's earlier argument and detailed what they considered to be the strategic advantages and disadvantages of single- and dual-mode institutional models for conducting distance learning. While single-mode systems benefited from an institutional commitment to distance and open learning and to achieving professional standards and quality, they also required an expensive infrastructure that gave rise to a cost-effective model of education only insofar as high enrolment volumes resulted in significant economies of scale. Dual-mode institutions, in contrast, were characterized as potentially offering courses

on campus and by distance education that met the same quality standards. However, they were disadvantaged in that dual-mode distance educators faced formidable impediments, notably disinterested faculty members and a form of teaching that was less valued and less effective than face-to-face instruction. The third organizational approach, consortia of dual-mode institutions, was deemed most meritorious in principle, but seldom workable.

Writing five years later, Rumble (1992), while recognizing the advantages of distance teaching universities (dedicated administrative structures; commitment to serving part-time students; development and delivery of learning materials and support services solely for distant students; economies of scale where large volumes of enrolments are served through limited curriculum and limited student services), drew attention to their vulnerability when faced with increasing competition from dual-mode providers. Institutions engaged primarily in on-campus instruction, but with important distance education offerings, were seen to have distinct advantages, including less expensively and faster- developed courses based on lecture notes; branding based on institutional credibility rather than on the quality of its distance education; student course selection based on institutional credibility rather than quality of learning experience; alternative delivery models; extensive curriculum; and parity of on- and off-campus academic standards where instructors and curriculum are the same. Rumble identified ways in which single-mode distance teaching universities could enhance their positioning through activities such as maintaining and improving the quality of what they already did; enshrining local support networks; recruiting internationally; expanding product development; and increasing collaboration and joint ventures. However, he controversially concluded that since dual-mode institutions could also develop similar strategies, a single-mode distance teaching institution's best defence might well be to convert to the dual-mode format and use its open and resource-based learning materials to serve both on- and off-campus learners.

This provocative recommendation gave rise to several responses: quality was argued to be a single-mode distance institution's best and only necessary defence (White, 1992); abandoning the narrow definition of distance learning and focusing on openness and flexibility through collaboration rather than competition was also emphasized (Mugridge, 1992; Keegan 1994), to which Rumble (1994) replied on the one hand that students selected courses on the basis of price and credential power rather than quality (and that funding agencies are often more concerned with cost than quality), and on the other hand that dual-mode institutions might well prefer to compete rather than to collaborate.

During the past ten years, nuances have been added to the debate. Daniel (1996) analyzed the inherent strengths of single-mode mega-universities and enumerated the sustainability factors for ODL (Daniel, 2004), including clarity of purpose and intention; economic structure; institutional structure and autonomy; leadership; effective and balanced teaching and learning systems; and intellectual excitement. Bates (1997) expressed his concern that single-mode institutions probably could not adapt and integrate new technologies in a way that made them competitive with dual-mode institutions, at least in countries with advanced information and communication technology (ICT) options. Shale (2002) argued that in Canada the administrative, budgeting, and government structures in dual-mode universities were stacked against alternative delivery, as were issues of intellectual property rights. Most recently, Rumble and Latchem (2004) questioned whether the longevity of mega-universities whose cost-effectiveness derives from economies of scale dependent on materials-based learning, with specialized and less labour-intensive division of labour, could transcend first (correspondence-based) and second (multimedia) generations of distance teaching, in the face of the third generation (interactive) of distance education with both a high-fixed and a high-variable costing structure.

Though touched upon by Paul (1989) and Abrioux (2003), one important distinguishable feature of several medium-sized, dedicated ODL institutions (and of all the Canadian ones) has been all but ignored by researchers: their often-mandated ability to provide open admissions, uncapped enrolment, and flexible, individualized learning systems.

This brief review of the literature illustrates that the relative advantages of one mode of distance delivery over another are hotly debated, and that the viability of the single-mode institution has been questioned for about 20 years. The two cases studied in this review thus provide much needed empirical evidence to inform both the debate and the related policy and practice in formal higher education.

2. The Rise and Fall of the British Columbia Open University

BCOU had its roots of experience as the provider of one of three services (adult basic education, career/technical/vocational education, and undergraduate arts and sciences) that originally constituted the Open Learning Institute (OLI). OLI was an organization established in 1978 by order-in-council (a decree of government made under existing legislation) in order to address, through open and distance education, many of the unmet post-secondary needs of primarily regional British Columbians who could not avail themselves of the traditional system of public adult education. As such, OLI was the manifestation of progressive, future-looking public policy, championed by a minister and deputy minister who chose not to follow the advice of the traditional institutions (particularly universities) who argued that they themselves could best meet the needs of non-traditional, regionally located adult learners.[4]

[4] For a complete discussion of the political context that gave birth to OLI, see Moran (1991 and 1993).

A significant name change to Open Learning Agency (OLA) occurred in 1988 when, under the *Open Learning Agency Act* (1987; hereafter referred to as the *OLA Act*), the organization was assigned the additional responsibility for the province's educational television authority (Knowledge Network). This firmly established a formal link between television and the provision of open and distance education that the creators of OLI had firmly believed to be of prime importance. The Open University was also formally established under this legislation and became one of three program units, along with the Open College and the Knowledge Network, of the organization. Over time, and through internal branding shifts (or in some cases, lack of attention to branding), the Open University has referred to itself as the Open University of British Columbia, the British Columbia Open University (BCOU), and the Open University of Canada (which the BC government demanded be dropped as they had not been consulted). By 2002, an internal reorganization had resulted in the BCOU encompassing not only the Open University division, but also the Open College.

Two distinguishing educational values—open learning and collaboration—consistently defined the college and university distance course and program offerings of the OLI (Mugridge 1986) and its successors. Openness represented an essential means of addressing the needs of adult, part-time learners and was reflected in delivery modes, academic regulations, and administrative processes. Complementary open features at BCOU included the British Columbia Educational Credit Bank and the arm of OLA's assessment of formal learning, the International Credential Evaluation Service.

During OLI's formative years, the Tri-University Presidents' Committee on Distance Education served as an advisory group to the OLI executive, and university academics from the University of British Columbia, the University of Victoria, and Simon Fraser University served on the original program advisory group. The emphasis on collaboration went far beyond recognizing OLI's place in a provincial education system and over time manifested itself in many ways.

In 1984, the OLI was named the central administrative headquarters of the Open University Consortium of British Columbia. Almost as controversial as the legislation establishing OLI, this initiative by the same minister and deputy minister directed OLI and the province's three universities to collaborate and combine their distance-delivered courses into a single, highly flexible and open OLI degree. With the creation of OLA and its Open University in 1988, the formal consortium structure was replaced by the creation of the Open University Planning Council (with greater representation from other BC universities and colleges than from OLA). The role of this body was to assess provincial requirements and priorities of university-level open learning programs; this advisory council also recommended annual and long-term program and fiscal plans to the OLA board (including level and allocation of grant funds for open learning, not only for OLA, but also for other post-secondary providers). The Open University Planning Council was abolished in response to budgetary pressures in 1997.

Other critical collaborative commitments involving OLA included the following:

- the participation and role of academics from other British Columbia public universities and colleges on the Open University Academic Council
- collaborative degrees (that built on college residential, or in some cases distance-delivered, career-oriented diplomas and in which BCOU offered two years of general education and a few capstone courses)
- collaborative program development (whereby joint course development resulted in a hitherto residential program from another institution being available entirely at a distance)
- course development (which, after demonstrating that the adoption of the United Kingdom's Open University courses as urged by the inventors of OLI was ineffective and inappropriate, used course teams; however, because of the absence of disciplinary academic staff at BCOU, there was

a reliance on professors from other institutions to serve as academic experts and course authors[5])

- course delivery (providing transfer courses for students earning credentials at other universities; developing special business arrangements, for example, with Simon Fraser University to provide library services to OLA students)

Notwithstanding the strategic importance that OLA assigned to collaboration in order to maximize both BCOU's academic credibility and its complementary role to the provincial post-secondary system, those interviewed and consulted for the purpose of this study consistently reported the following institutional vulnerabilities from which BCOU suffered:

- lack of credibility in the eyes of sister universities that had never considered BCOU to be a real university, primarily because OLA's governance structure and staffing complement were void of dedicated BCOU academics
- relatively low enrolment growth historically and sub-zero growth over the last ten years
- considerable competition within the province for distance learning (though not for open learning) from other universities, new university colleges, and other private or public institutions offering distance-delivered programs
- the significant expansion of degree-awarding status to community colleges
- a shallow understanding on the part of government of BCOU's contribution to post-secondary education
- less than optimal relations between government and BCOU, particularly during the last five years

[5] Eventually, authoring contracts went to tender and were increasingly carried out by the BCOU's part-time tutors.

- insufficient attention to relationship building with sister institutions during the last ten years, culminating in poor relations particularly during the last five years
- inflexibility and restrictions in some of its systems and practices as a result of the fact that BCOU was one of three constituencies of OLA
- during the five or so years preceding the decision to disband BCOU, insufficient attention to course revisions, updates, and conversion to e-learning formats
- a diminishing commitment to the importance of course and program delivery (in contrast to either the Knowledge Network, the credit assessment/coordination services, or both), as exemplified by the decision not to replace the departing OLA vice-president who had the dedicated responsibility for the Open University (1994)
- OLA's unclear use of, and role for, the Knowledge Network as a strategic asset in open and distance learning

Some of these issues combined to prevent BCOU from developing a market share and reaching a critical mass of enrolled students. Overcoming this failure would have been its greatest strength, but as Table 1 shows, BCOU's enrolment failed to increase from 1995/1996 to 2000/2001—particularly at the time when distance and online education was exploding all over the world—and by 2004/2005 had even declined (a factor that one interviewee attributed to the institution's uncertain prospects after the 2002 announcement, and which we will consider in the next pages of this study).

Equally important, however, was the fact that BCOU's market share in British Columbia declined significantly over the same two periods, and this notwithstanding the fact that its open, uncapped registration policy ought to have had the opposite effect, given that dual-mode universities in the province had had to restrict their distance education enrolments in accordance with the wishes of the academic faculties that were preoccupied with campus-based

education. By the last year of its operation, BCOU's total enrolment was only marginally greater than Simon Fraser University's distance enrolment.[6]

TABLE 1 British Columbia Distance Education Course Registration Trends[a]

1995/96		2000/01	2004/05	Per cent 10-year growth
BCOU[b]	18,540	18,500	17,570	– 5%
SFU	13,000	13,890	15,714	+ 21%
UBC	4,483[c]	7,029	7,446	+ 66%
UVIC	3,805	5,233	5,519	+ 45%

Notes

[a] Three-credit course equivalencies, where one FLE equals ten three-credit courses.

[b] All BCOU figures combine the Open University and the Open College registrations, as was the BCOU's practice in its later years.

[c] All UBC figures are for three-credit equivalents registered through the Distance Education and Technology unit (or Learning Technologies) in 2004/2005. This unit would have accounted for about 85 per cent of UBC distance education registrations. Moreover, owing to difficulties in collecting data, the first-year figures are for 1996/1997 not 1995/1996.

Just how vulnerable OLA and its component parts were became evident when the post-secondary sector came under scrutiny with a government announcement in 2001 of a core review of all provincial programs and services, which was to be an important step in getting the province's financial house in order. With respect to the colleges and universities, this review was intended to enable government to better rationalize its investment: consequently, the government announced a three-year freeze on post-secondary funding to permit reallocation of some institutional funding in order to improve accessibility, quality, and cost-effectiveness.

[6] SFU, had never supported the creation of OLI and had instead (unsuccessfully) advocated developing its own province-wide distance education system.

In October 2002, BCOU's fate was sealed when the provincial government announced that over a two-year period its core services would be transferred to other public post-secondary institutions in the province and that a collaborative model of online and distance learning in the province would be created under the coordinating structure of the new BCcampus network. In order to implement its decision, in March 2003 the government released a request for expressions of interest (EOIs) and invited the 26 public post-secondary institutions in British Columbia to submit EOIs. The call for submissions included a package of current information about BCOU's operations and a list of criteria that would be used for evaluation purposes. Key for the purposes of this study were the following items:

- significant experience in distance education by the applicant
- the willingness to manage BCOU within BCcampus and to actively participate in its development
- a commitment to continue to provide the flexible services of BCOU, including
    - flexible credentials with minimal residency requirements
    - credit banking
    - open access to courses
    - continuous enrolment
    - recognition of non-formal learning
    - access to Open University Consortium courses
- a commitment to improve cost-effectiveness by achieving economies of scale through the integration of systems and/or services

Two EOIs, one from the British Columbia Institute of Technology (BCIT) and another from Royal Roads University (RRU), were received and reviewed by the government, who in turn asked OLA for its recommendations. Interviewees reported that one proposal (RRU's) failed to meet the criteria for takeover

established by the government, and that while BCIT's submission did in fact address the government's conditions, it also introduced several new ones. After detailed discussions with BCIT, the government concluded that the conditions proposed by BCIT were unacceptable (though BCIT did acquire two of OLA's other components: the International Credential Evaluation Service and the Canadian Learning Bank/Credit Review Services) and subsequently arrived at a solution that most interviewees consider to be entirely political.

The aspiration of several university colleges to become full-fledged universities had for some time been a contentious issue in British Columbia. With the decision on March 17, 2004, to transform the university component of the Okanagan University College into a campus of the prestigious University of British Columbia (UBC) effective September 2005, addressing the university status aspirations of the neighbouring UCC assumed a heightened political urgency (in part, because the close proximity of the two institutions would otherwise lead to UCC losing many of its students to the new Kelowna campus of UBC). Notwithstanding the fact that UCC had not submitted a proposal for acquiring BCOU, the idea of achieving two goals with one solution was proposed by the then assistant deputy minister, Jim Soles. Soles saw a possible fit between the open mandate of BCOU and UCC's modus operandi (multiple campuses; flexible admission; and credit coordination).

On March 19, 2004, and after negotiations with UCC that were captured in a memorandum of understanding (MOU), the provincial government announced that BCOU would combine with UCC on April 1, 2005, and form a new university (subsequently called TRU). Until the end of the transition period on April 1, 2007, the former BCOU would continue to operate as TRU-OL out of its existing Greater Vancouver location.

3. The *New* Thompson Rivers University – Open Learning

Legal Framework

The *Thompson Rivers University Act* (2005; hereafter referred to as the *TRU Act*) is the official government document that provides a regulatory framework for the new Thompson Rivers University–Open Learning (TRU-OL), the most recent manifestation of the single-mode distance learning university previously called the British Columbia Open University (BCOU). The act addresses the UCC/BCOU merger by

- identifying as one of the university's purposes the establishment of an open learning educational credit bank for students.
- stipulating that in carrying out its purposes, TRU-OL must serve the open learning needs of British Columbia.
- establishing the Planning Council for Open Learning (which consists of up to nine representatives, including two teaching staff from TRU-OL;[7] one TRU-OL student; two representatives nominated by presidents of other British Columbia universities; two representatives nominated by other presidents in the college and institute sector; one alumni; and up to two further appointments at the discretion of the TRU-OL president).
- assigning to this council, the Planning Council for Open Learning, the power to
    - set admission requirements for TRU-OL courses and programs.
    - set residency requirements for TRU-OL credentials.

[7] The legislation refers to the Open Learning Division rather than the division's new organizational name (TRU-OL).

- allowing this council to advise or recommend to the TRU board[8] on
    - matters concerning the educational mandate of TRU-OL.
    - the establishment, revision, or discontinuance of courses and programs in TRU-OL.
    - strategic direction for TRU-OL, including its role as a system partner in online learning in British Columbia.
    - other matters as requested by the TRU board.
- requiring that this council report any resolutions it makes to the Open University Council.[9]

UCC and Ministry Memorandum of Understanding

Though it does not create binding legal obligations between the parties, the MOU that predates the *TRU Act* by one year speaks to the major understanding of the terms and the implications for establishing the new university that would result from UCC's acquisition of BCOU. Of particular interest to its assumed ODL role are the following subtleties that the *TRU Act* either does not reference or attaches a significantly lower level of importance to:

- the desired open and flexible features, as enumerated in the 2003 EOI, are cited and committed to by both parties, but the *TRU Act* is much vaguer on what ODL means
- the new governance model anticipates the establishment in legislation of a "second Academic Council…to guarantee the quality of programs transferred and developed by BCOU/OC and the 'openness' of these courses and programs" (*Memorandum of Understanding: University College of the Cariboo as a Special Purpose University*, 2004) but the *TRU*

[8] Either directly, or through the Open University Council
[9] The Open University Council is the body with responsibilities similar to those of an academic senate or academic council.

Act assigns much more limited authority to the Planning Council for Open Learning

- under the heading "Research and Scholarship," focused research in a number of possible streams of particular interest to the Kamloops region is referred to, as well as research in support of teaching. Interesting by its omission (both in the MOU and in the *TRU Act*) is any language that addresses one of BCOU's responsibilities under the *OLA Act*, the carrying out of research specifically related to open learning

Internal Organization and Management

Until 2007, when the BCOU functions and staff are to formally relocate to TRU's main campus in Kamloops, the former BCOU component of the new TRU-OL will continue to operate out of the same facilities as did BCOU in Greater Vancouver. During this interim period, it is expected that BCOU's student management system will remain intact until a decision about its fate is made, at which point it will be standardized either around Colleague or Banner, the systems used by UCC and BCOU, respectively. Other support systems, such as those supporting the library, finance, and information technology are already in the process of being integrated.

Given the small number of full-time BCOU staff who are likely to accept relocation to Kamloops (a city of about 80,000 located 350 kilometres north-east of Vancouver) in 2007 (about 40 individuals, or 20 per cent),[10] merging the two organizations and their very distinctive cultures is less controversial than might otherwise have been the case.

The academic functions represent the greatest integration challenge, but authority for decisions around academic responsibility for courses and programs

[10] However, it is understandable that about 90 per cent of BCOU's part-time, home-based tutors are expected to remain with TRU.

(quality control, course development, course content, course and program offerings, tutors, and enrolment management) has been assigned to the academic deans, under the umbrella authority of both the university council and the Planning Council for Open Learning. BCOU's Instructional Development and Research Group, whose mandate will expand to serve both distance and campus-based instruction, will assume the responsibility for distance education design specialists (instructional designers, course editors, and media and information technology professionals). The three academic directors of the former BCOU now report to the associate vice-president academic for operational matters and to the TRU academic deans for other matters.

TRU-OL, with responsibility for distance education programs and open learning, reports through the associate vice-president academic and chief operating officer of the Burnaby (formerly BCOU) campus, who in turn reports to the provost and vice-president academic on academic matters, and to the university executive on transitional affairs. While the precise responsibilities of TRU-OL have yet to be finalized, the intent is that this division will administratively manage all courses and programs delivered at a distance (which had previously been delivered by both BCOU and UCC) and will house the credit bank and the template degree programs as well.

The inability of BCOU to enlarge its market share in the face of competition with, and the progress of, dual-mode institutions in the province, together with questionable leadership and poor relations with government and sister institutions, were the principal factors in the decision, triggered by province-wide government cutbacks, to disestablish this single-mode university. Only time will tell whether its reconstitution as part of TRU will better serve the needs of British Columbia's population that relies on open learning to meet its educational goals. In a subsequent section of this study (7.i), the likelihood of this eventuality is discussed.

4. The Evolution of the Télé-université du Québec

Created by the UQ in 1972 as an experimental program for the development and delivery of distance education programs to complement the primarily on-site offerings of its regional member institutions, the TÉLUQ[11] was formally recognized by the Government of Quebec in 1992 as a single-mode distance education university, and a full member of the multi-institutional UQ. During the 20 years that culminated with the issuing of its government patent, and even thereafter, TÉLUQ's future was repeatedly called into question by the mother institution itself (UQ), by its UQ regional institutional constituents, by overarching bodies that oversaw the Quebec higher education system, and by government.

At the heart of the prolonged debate lay a fundamental issue regarding mandate: did TÉLUQ exist primarily to serve the other universities of the UQ network (the majority of which are located outside the two major agglomerations of Quebec and Montreal), or was it to be an autonomous university, free to compete and collaborate as it saw fit? Where one positioned TÉLUQ on this continuum had important consequences for the envisaged programming and delivery opportunities for the institution. At one extreme, TÉLUQ would be at the service of the other institutional members, helping them to develop their own distance education capabilities and only offering courses and programs (upon request) that complemented the curriculum and delivery models of regional institutions. At the other extreme, it was argued that TÉLUQ needed to be free to develop and deliver programs and courses as it sought fit, competing and collaborating in accordance with a strategic business plan, as only then could it gain economies of scale that would justify, on a cost per full-load equivalent (FLE) student basis, its existence.

[11] For a more detailed account of the years leading to the granting to TÉLUQ of its patent, see Guillemet, Bédard, and Landry (1986) and Guillemet (2003).

Long in coming, the 1992 patent was very well received by TÉLUQ because it formally recognized the institution and because two of the UQ's revised recommendations had been accepted: on the one hand, the absence of any obligation on TÉLUQ to negotiate its regional activities with regional member universities; on the other hand, the requirement that TÉLUQ operate with costs that were no higher than those of other universities (when in fact there had been a push by some of its detractors to enshrine that costs be lower).[12] Confident in its future, TÉLUQ went about its business. At a time when enrolments in the UQ system were declining, TÉLUQ enrolments increased moderately (though not at the same rate as at its dual-mode competitor, l'Université Laval), primarily because of a new ability to attract visiting students. Curriculum development bloomed; externally funded mission-critical research took off; the university's cost-recovery corporate training and international activities raised the institution's profile and branding; and government invested about $9 million over three years in ICT in recognition of TÉLUQ's migration to a virtual university environment (and instead of the physical facilities infrastructure dollars that other universities in the province enjoyed).

Optimism proved to be short-lived, however, when in 1997 the incoming UQ president announced in an address to senior management the establishment of a committee to review TÉLUQ's role in the UQ system—and particularly the rationale underlying its independent program offerings. The ensuing report on distance and multimedia education at UQ (*Rapport du groupe de travail sur le télé-enseignement et la multimédiatisation*, 1998) blamed TÉLUQ in part for enrolment decreases in regional UQ institutions and recommended both reducing its program offerings and requiring that it operate more cost-effectively than the other universities in the system. While these recommendations were not acted upon, in 2000 the UQ president repeated his call for the need to rationalize TÉLUQ's role in the UQ system.

[12] This paragraph and the two following draw heavily on Guillemet (2003).

Continued internal questioning of TÉLUQ's future was further compounded by the experience that came in the subsequent years. Whereas TÉLUQ had occupied the best financial position of any Quebec university, with accumulated surpluses and the lowest per-FLE costs in the system, TÉLUQ—primarily as a result of much higher than predicted investment costs in new technology—experienced its first budget deficit (of $2 million) in 1999 and calculated that this deficit would grow to $7 million over five years. Moreover, as was the case throughout the Quebec university system, a new obligation to sign off on performance contracts led to unrealistic plans for reversing its financial predicament: the administration committed to dramatically increasing its FLE count by about 40 per cent over the next five years (a strategy that was challenged internally because the FLE numbers over the previous ten years had consistently been between 1,400 and 1,500—and this at a time when the number of courses offered had practically doubled). As Table 2 demonstrates, those who presented negative views proved to be correct. Not only did planned growth rates fail to materialize, but by 2004 TÉLUQ had in fact lost a significant part of its market share.

TABLE 2 Distance Education Quebec Course Registration Trends (data from Saucier, 2006)

1995–1996		**2000–2001**	**2004–2005**	**Per cent 10-year registration increase**	**Per cent 10-year market share**
Télé-université	22,103	24,902	28,644	+ 30%	– 12%
Laval	8,272	18,285	18,608	+ 125%	+ 11%
Montréal	3,624	6,584	6,644	+ 83%	+ 1%

It was clear early on that the five-year growth target would not be met[13] (and was only in part attributable to shortcomings in a new student information

[13] Fortunately, though, a new provincial government elected in 2003 subsequently set aside institutional funding through performance contracts.

system and to the adverse impact of the September 11, 2001, terrorism on that key month's enrolment activity); and a sense of institutional crisis emerged. When the administration's new set of solutions failed to gain the support of the academic union who demanded greater fiscal clarity and a formal role in resolving the financial crisis, relationships between TÉLUQ's administration and this union deteriorated dramatically. This culminated in a vote of non-confidence (February 2002), in the refusal to even meet with the director general, and subsequently in the boycotting of university committees on which the union had formal representation (November 2002)—all of this in sharp contrast to the tremendous internal support (90 per cent) with which the director general had been appointed for a second term three years earlier and with the continued high level of support that TÉLUQ's Administrative Council continued to demonstrate in her leadership.

Conscious of its vulnerability, TÉLUQ, under the leadership of its then director general, had assumed the responsibility of exploring ways to strategically strengthen its position by formalizing a partnership with another university in the province. Initially, the TÉLUQ director general had explored potential alliances both with sister institutions in the UQ network and with other Quebec universities that had a strong track record in distance education, but it became clear that the UQ head office would only support a strategic relationship with one of the UQ institutions.

By 2002, it had become evident that the only likely partner would be UQAM and that an alliance with this institution, which allowed TÉLUQ to access its extensive programming and credentials, could be very beneficial. While the road forward was far from smooth, the director general continued to explore the idea of an alliance with UQAM; and, following a supportive motion from the UQ Board of Governors (in March 2002) that both institutions explore areas of possible joint interest and the possible terms of such an affiliation, the administrative councils of both institutions endorsed an agreement (in December 2002) to develop the nature and terms of an inter-institutional

alliance that would maximize the complementary nature of the academic plans of both institutions.

About 150 members of both institutions worked through various committees to elaborate the terms of reference (legal, academic, organizational, and financial), deliberations that resulted in a draft protocol agreement (November 2003). The work of the joint committees, comprising equal membership from both universities, was conducted while a less than optimal internal climate continued to reign at TÉLUQ. Of considerable significance was the (principally) academics' clash with the director general and her non-academic management team about how much autonomy should be exchanged for affiliation with UQAM, with the director general more demanding in points related to maintaining TÉLUQ's autonomy and institutional patent than were the academics. The timing, moreover, coincided with the director general's application for a third five-year term, an eventuality that did not materialize, as she was challenged by her vice-president academic who, with the faculty and faculty union's quasi support, was selected and appointed, and subsequently sanctioned the terms of final affiliation with UQAM. In turn, the respective councils approved (June 2004) and submitted to government (with the consent of the UQ system) the details of the proposed affiliation, terms which the previous director general could not support given that TÉLUQ was to lose its legal patent and official status as a self-standing institution. On October 26, 2005, TÉLUQ's existence as an autonomous single-mode distance education institution formally ended with the revocation of its patent and the formal amendment of UQAM's patent.

5. The *New* Université du Québec à Montréal/Télé-université

Four documents[14] define the relationship that the new TÉLUQ is to have both with UQAM and with its sister institutions in the UQ system: (1) the *Decree of Government of Quebec, 464-2005* (2005); (2) the *Protocol for Joining the Télé-université to the Université du Québec à Montréal* (2004); (3) the *Annex to the Protocol Agreement: Framework for the Development of UQAM-TÉLUQ Distance Education 2005–2010* (2004); and (4) the *Partnership Agreement for Developing Distance Education within the UQ System* (2004).

The government decree establishes TÉLUQ as an institutional component within UQAM and repeals the TÉLUQ's patent as a self-standing institution within the UQ system. TÉLUQ's mandate remains basically unchanged, except that its purpose now formally includes promoting the development of distance education within the UQ system.

TÉLUQ's management is entrusted to a management council that must advise UQAM's Administrative Council before the latter can take any action relating to TÉLUQ's mandate. Lastly, the legislation establishes an Academic Council for Distance Education with which UQAM's overarching Academic Council must consult before exercising its own overriding authority on academic programming and projects.

Between the signing of the agreement in principle (December 2002) and the UQ's approval (June 2004) of the proposed terms of the new UQAM-TÉLUQ relationship, considerable work was invested by both institutions in determining the nature and details of the optimal inter-institutional working relationship that would be required in order to meet the common objective, which was stated as "the emergence of the new dual mode university, which represents the future of

[14] A detailed summary of these documents is provided in appendix A.

the University, a project which will soon become one of the Université du Québec's greatest assets, a beacon for the entire Quebec university system and for the values of accessibility, quality, and democracy that it promotes" (Bertrand and Denis, 2003, translated from French by the author).

While the protocol agreement is not referenced by the Government of Quebec decree amending UQAM's patent (though the motions passed by TÉLUQ, UQAM, and UQ that do reference this document are referenced in the preamble to the decree), and while it is unclear what the protocol agreement's legal standing might be, it is clear that its authority is heavily institutional and collegial in nature, and that it results from extensive grassroots consultation, creative thinking, and consensus building. It is the result of a process that first sought to determine whether there was an academic rationale for linking the two institutions, and only thereafter to work out administrative, management, and legal arrangements that would make this possible. The protocol agreement consequently defines the relationship between TÉLUQ and its mother institution, UQAM.

The crux of the association rests in the recognition that the particular goals and objectives for distance education in Quebec can best be served by maintaining TÉLUQ's arm's-length, and its distinct governing, academic, and administrative bodies, thereby creating "a university within a university." To that end, the integrity of TÉLUQ's organizational structure, including its academic and research units, is maintained. These, as is the case with any of the other areas covered by the protocol agreement, can only be changed in the future if the changes are approved by TÉLUQ's director general and management council. Insofar as budget is concerned, TÉLUQ is promised at least the same level of funding as it would received if it were funded directly by the government.

By accessing UQAM courses, programs, and faculty, the protocol agreement commits to significantly expanded and enriched distanced offerings, accessible to UQAM residential students, typical TÉLUQ adult learners, and, as a result of

agreements to be negotiated with other UQ institutions, visiting students. The appendix to the protocol agreement sets a very ambitious (though well-reasoned) target for increased enrolment: a doubling within five years; and as a result of additional (in-kind) UQAM resources of some $10 million by 2010, an increase in the number of distance education courses from 325 to 500 over the same period. Two important measures are taken in order to interest UQAM faculty in developing and delivering distance education: on the one hand, secondments for course development; on the other, the counting (for internal funding reasons and registration reporting) of traditional UQAM students who enrol in distance education courses offered through TÉLUQ by the hitherto campus delivery-based department.

Lastly, and by means of the establishment of the Université du Québec Distance Educational Council, a framework is set for inter-institutional collaboration to advance distance education's role within the UQ system. This body oversees the coordination of distance education throughout the UQ system and seeks to promote joint course and program development and delivery.

TÉLUQ's response to its structural inability to develop the breadth of programs that it believed would have allowed it to expand its volume of enrolments and market share, thereby making it much less vulnerable in the long term to the pressures that the other members of the UQ network continuously subjected it to, led this single-mode distance institution to enter into a new dual-mode partnership with the largest, and most autonomous, of the UQ network universities. Whether this new organizational arrangement with UQAM will benefit the open learning needs of UQ system students in general remains to be seen, though a later section of this study (7.ii) analyzes the chances of this occurring.

6. BCOU and TÉLUQ: Commonalities and Differences

6.i. Their Development as Single-mode ODL Universities

Origins and Government Support

Whereas TÉLUQ, a pilot project in distance education created by the UQ system, was not formally conferred institutional status by government until 20 years after its creation, BCOU's precursor, OLI, represented a conscious decision by the British Columbian government to create an innovative organization to serve geographically disadvantaged adult learners. As such, the latter was funded directly by government from its inception, while the UQ's board of governors, rather than the Government of Quebec, always finalized TÉLUQ's annual budget (as it did for all members of the UQ system[15] in order to respect system priorities). On at least two occasions, for example, TÉLUQ agreed to receive less funding than the UQ received for it from government.

These important differences notwithstanding, the interviewees were of one mind in judging that the respective provincial governments had treated these innovative institutions fairly when one compared their annual grants to those of their traditional, campus-based counterparts in their post-secondary system. This was not the case, however, with the more recent moves in both jurisdictions to institutional performance assessment, as there was reluctance on the part of government to accept different key performance indicators as a basis for evaluating dramatically different kinds of institutions. This was further compounded in the case of BCOU by the fact that OLA also comprised a

[15] After UQAM received the status of an "associated university" rather than that of an "institutional component" like the other entities in the UQ system, it became the exception that proved the rule.

college, and even though its university component had always been far more significant, it had been asked to report more in line with colleges than with universities.

More frequent, however, were the interviewees' remarks about the considerable difficulty experienced by both institutions in mustering significant political, rather than financial, support from all levels of government staff and elected officials (with the notable exception of OLI's early years, though the support then was primarily from the minister and deputy minister, not the government as a whole). This was attributed to numerous factors: small size; location in urban centres with other, much larger post-secondary institutions; limited regional economic impact owing to decentralized staff and the absence of on-site students who identified with the institution; minimal student support (given that many students were enrolled in credentials elsewhere, were geographically scattered, or both); practically non-existent lobbying power by alumni (their cumulative numbers being very low); and concerns about the stealing of enrolments from regionally based institutions that local politicians frequently heard about.

For one year, responsibility for OLA was transferred (2000) from the Advanced Education, Training and Technology ministry to Agriculture, Food and Fisheries, the ministry that was also responsible for rural development. This change was cited as evidence of the lack of political support for, and understanding of OLA. Moreover, this transfer was interpreted in some government circles as a possible first step (which was never taken) in relocating OLA (minus the public television Knowledge Network) to the new minister's rural home riding of Nelson, British Columbia.[16]

[16] In the 1990s, at the time of the establishment of the province's fourth residential university in northern British Columbia, consideration had also been given to an amalgamation and move of OLA to that community.

While TÉLUQ's head office location in the greater region of Quebec City had never really been challenged, this university remained practically as unknown and lacking in local political support as did OLA in Greater Vancouver, with one difference: when the OLA move to Kamloops was announced, Soles reported in the interview that "there was no sense that Burnaby or Vancouver had lost anything, as OLA was kind of invisible to the community" and that the decision was greeted by the Kamloops community more enthusiastically than any British Columbia post-secondary announcement he had ever seen. In contrast, the myth that the attachment of TÉLUQ to UQAM could result in a transfer of its head office and staff from Quebec City to Montreal did attract the attention of the former municipality, even though such a transfer had never been considered, let alone planned.

Institutional Credibility and Inter-Institutional Support

In both instances, interviewees were quick to point out that the credentials that the two universities conferred were undervalued by the business world and by other institutions. The interviewees unanimously said that at TÉLUQ the big winners in the reorganization would be its graduates, as an UQAM credential has much greater currency than a TÉLUQ award from the UQ.

Moreover, in both series of interviews it was reported that sister institutions had always questioned the credibility of these non-traditional universities, because they probably did not understand how they operated, had never seen or experienced their courses, considered the absence or quasi-absence of faculty as unacceptable or threatening, and used their own key performance indicators to assess the output of their non-traditional counterparts. In the case of BCOU, the negative perspective of sister institutions was exacerbated by their poor interpersonal relations with the last regular president, and in both cases there were concerns from regionally based universities, university colleges, and colleges that their enrolments were being poached or lured away by the single-mode distance institution. In Quebec, such questioning was more explicit, given

that these institutions were part of the same overarching university network, and that during the most recent critical phase (1996–2003) it was reflected in the UQ president's own publicly held position. This notwithstanding, several interviewees believed that TÉLUQ might in fact have been more vulnerable had it been a stand-alone university, as even in difficult times there was always one or another member of the UQ system who came to TÉLUQ's defence.

Collaboration

In spite of both institutions' commitments to collaborate with sister institutions in developing and delivering courses and programs, the experiences related by the interviewees in both instances was that co-operation proved to be complicated, not very productive, and quite messy. Even when the single-mode institution was not seen as occupying a competitive position, interviewees reported little commitment by faculty, deans, and department heads at the dual-mode institution to engage in substantive collaboration in course or program development, even when formal agreements were in place (e.g., the UQAM-TÉLUQ MBA, considered by TÉLUQ as a potentially critical tool in its competition with l'Université Laval, and an up-and-comer in distance education[17]).

Openness and Flexibility

Both institutions prized themselves with a strong student-centredness and with institutional openness and flexibility as reflected in admission criteria, program regulations (residency,[18] time to completion), course design (individualized and self-paced learning modules, minimal course prerequisites), and course availability (uncapped and continuous enrolment). In addition to these common elements of openness, BCOU differentiated itself from TÉLUQ by virtue of its

[17] Two interviewees also saw this as reflective of the difficulties that TÉLUQ will face in its new modus operandi.

[18] In distance education, residency generally refers to the minimum number of course credits that learners have to earn from the credential-awarding institution.

strong commitment to credit banking, prior-learning assessment, and block transfers.

It is worth noting, however, that such openness was used against both of these institutions by sister institutions, many of whom defined themselves not by their openness but by their exclusiveness. Moreover, these attributes did not translate into market share in face of local or brand offerings by other universities.

Programming

Both BCOU and TÉLUQ offered a relatively small selection of primarily undergraduate programs to adult learners, a large number of whom were enrolled in full- or part-time programs at other universities. BCOU collaborated extensively with colleges, articulating two-year programs into their four-year degrees, and offering some undergraduate degrees that depended solely on students taking the core curriculum from colleges.

In recent years, TÉLUQ did expand into graduate studies by offering, though to small numbers of students, four graduate diplomas, a master's degree in distance education, and (in 2005) a doctorate in cognitive information sciences.

TÉLUQ considered its restricted programming (attributable both to its small core faculty and to major political hurdles around establishing new programs) to be the source of its inability to significantly increase student volume, as the market for French-language programming in Canada is relatively small and requires proportionally many more products (programs and courses) in order to achieve comparable economies of scale in delivery. BCOU interviewees, however, did not make this connection as directly, though there was a sense that during the five years leading to its demise, BCOU paid too little attention to developing new courses and keeping the existing ones current. In addition, the TRU president attributed BCOU's falling market share in part to its failure to differentiate its programs in the marketplace and in part to its pursuit of visiting

students, a group that he believed had diminished in importance in recent years, given the government's investments in increasing the capacity of existing institutions to accommodate more learners.[19]

Course Quality

In contrast to what occurs in dual-mode institutions where the lone ranger (Bates, 2000) approach often characterizes distance education course development and teaching, both TÉLUQ and BCOU considered their multidisciplinary, multiprofessional course team approach to course development to be an essential ingredient of quality. Some (administrator) proponents of each merger, however, did question whether or not such labour- and media-intensive course development projects were not more elaborate and cost-ineffective than was necessary, given the increasing capacity of teacher-developed courses, designed and delivered with the assistance of current learning management systems and other web-based tools.

Enrolment Growth Pattern

For different reasons, both organizations have demonstrated difficulty in significantly raising their enrolment numbers. In British Columbia, most interviewees blamed BCOU's drop in enrolment and in market share on the fact that other (dual-mode) university providers had expanded their offerings—creating a highly competitive marketplace—and on increased options for university-level education and degrees from regional university colleges and colleges. One interviewee, however, believed that a better-branded out-of-province public provider had also played a significant role by capturing important market share. Given the small provincial population base, and the relative abundance of post-secondary institutions (at least in comparison to geographic areas where mega-universities flourish), expansion beyond

[19] However, system-wide data as reported in the February 2006 issue of the *British Columbia Council on Admissions and Transfer Newsletter* reveals that transfer and mobility of students within British Columbia is increasing.

provincial boundaries would seem to be a necessary precondition for sustained growth, particularly when national or international out-of-province providers are themselves present in one's own home region.

In contrast, TÉLUQ was able to increase its enrolment in Quebec during the time frame being considered, but it did so only moderately, while at the same time losing market share. Competition for students increased significantly only during the period 1995–2000, during which TÉLUQ lost almost 15 per cent of its market share, a trend that reversed itself during the next four years. This was not owing only to the fact that distance education registrations at its dual-mode competitors failed to meet TÉLUQ's moderate growth pattern, but also because they actually decreased.[20] These factors resulted in a cumulative 11 per cent loss of market share for TÉLUQ since 1995/1996. Though the number of courses increased significantly, the university's inability to significantly expand its programming was considered by many interviewees as the root cause of limited annual enrolment increases.

Cost-effectiveness

Both universities believed their operating costs per FLE were considerably lower than those at sister universities (though neither one seems to have factored in the research output at universities with equivalent government grants).[21] The British Columbia government itself concluded in its core review that BCOU's average cost per FLE student was the lowest in the system (but simultaneously introduced a questionable concern by stating that the review was unable to include a comparison of BCOU's costs to average or marginal distance education costs elsewhere). Indeed, one interviewee emphasized that OLA self-

[20] This pattern of rapid growth, followed by a levelling off period, of distance education enrolments at dual-mode institutions is seen as a reflection of the wishes of the traditional faculty rather than a slowdown in demand.

[21] Of significance here is total institutional output rather than output per faculty member.

financed almost two-thirds of its annual operating budget through tuition and related fees.

In neither case did questions about their cost-effectiveness ultimately contribute to the mergers,[22] though in both cases the institutions now responsible for ODL anticipate that their distance education offerings will become still more cost-effective. Some of the views held at TÉLUQ do not support this assessment: several interviewees remarked that a new five-year collective agreement with the academic union had resulted in their membership moving from being the lowest- to the highest-paid academics in the UQ system (at least until 2007, when UQAM's faculty contract expires).

Governance

While both institutions were single-mode distance learning organizations, neither TÉLUQ nor BCOU was truly autonomous and able to shape its future in the same manner as other universities do. TÉLUQ's academic and non-academic strategic decisions required not only the support and approval of its own academic commission and administrative council, but also that of the UQ system's common academic council and board of governors. These last two bodies were not primarily focused on distance education and in fact had a membership that included some staunch opponents to the very continuance of TÉLUQ.

Interviewees also commented—though less frequently than about TÉLUQ—on hurdles around autonomy at BCOU, where the legislated Open University Planning Council consisted overwhelmingly of external appointments made by other universities and colleges, and by a self-imposed Open University Academic Council that drew its academic expertise externally.

[22] While the OLA demise was initially motivated by the promise of saving money, for at least three years TRU will receive an amount about equivalent to the BCOU's part of the OLA government grant.

BCOU's ability to take control of its own future may have been further jeopardized by the fact that it was part of a multifocused organization (OLA) that had a legal mandate to also operate an open college and a public television network. This resulted in multiple core businesses, whose respective importance was not necessarily clear or agreed upon, even internally.

Finally, some interviewees considered board composition as important contributing factors to their institution's vulnerability. The absence of a dedicated board of governors for TÉLUQ meant that there were few public board members committed to developing political support for distance education; and the presence of an OLA board with little political clout did nothing to enhance the politicians' understanding of that institution—nor did it result in the board being strong advocates for OLA when its future was being questioned.

Staffing

Though relatively similar in staffing levels, there is one formidable difference between the composition of the TÉLUQ and the BCOU staffing complement: the presence of full-time academic appointments at TÉLUQ and an absence of them at BCOU. This difference had not always existed: it was in 1981 that TÉLUQ had reached a critical decision about the need to engage tenure-track academic appointments and to build up its professoriate and, with it, the academic credibility that doing so would lend—rightly or wrongly—to the teaching functions and the concomitant research in which faculty would engage.

All interviewees considered the fact that TÉLUQ had academic faculty, albeit only about 50, a significant factor in determining the nature of the new institution. Some interviewees thought that the faculty had for several years been working to increase the collegial input into the management and administration of the institution; and that this agenda translated into strong union support for a change in director generals and for favouring a director

general candidate who had been more closely aligned with, and had come from, the academic faculty. Not incidentally (given the TÉLUQ faculty's strong desire to affiliate with UQAM), this candidate was also more supportive of the terms of the subsequent affiliation than had been the previous director general, though some believe that by publicly supporting the new director general the faculty union may indirectly have weakened its negotiating hand with UQAM. For others, the presence of a faculty core had a definite impact on the selection of UQAM as a partner and on the terms of the protocol agreement that was drafted; they thought that, had TÉLUQ not had its own cadre of academics, the initially perceived interest of UQAM in TÉLUQ might well have materialized, and TÉLUQ would simply have served as an enhanced media design unit for the larger university. Moreover, several interviewees considered significant in the decision-making process the fact that about half (20–25) of TÉLUQ's professoriate actually lived in Montreal and worked primarily out of TÉLUQ's facilities there.

Similarly, the absence of a regular full-time faculty complement in the BCOU model—which depended on external academic contracts for course content, on part-time course tutors for delivery, and on academics from other institutions for program advice—was considered by most interviewees as a critical factor in the institution's vulnerability in terms of the subsequent takeover of BCOU. Academics are considered as the primary relationship builders across universities. Not only did the absence of faculty at BCOU prevent significant networking and inter-institutional relationship building around teaching and research, but it also severely undermined the Open University's credibility. The absence of a core BCOU faculty group as part of the new assets of TRU was repeatedly cited as a major factor in the nature of the integration of BCOU into TRU and in the questionable future of distinctive open learning in British Columbia from that point on.

Lastly, in both case studies, the belief that the strategic expertise of the organization rested in a very small subset of its staff (15–25 people) was

identified as a source of institutional vulnerability, particularly in the context of a possible hostile takeover, in whole or in part, by another institution.

Research

With a core academic staff, TÉLUQ's commitment to research was entrenched not only in their patent, but also in the institution's practices and culture. Several interviewees commented on the fact that they believed that on a per-faculty member basis, more research was carried out at TÉLUQ than at UQAM. Of particular interest is the very strong mission-critical research focusing on distributed and technology-assisted learning, much of which was funded through successful competition for dollars provided by provincial and national funding bodies.

In contrast, and though specifically mandated in the OLA legislation to "carry out research related to open learning education," BCOU's output in this area had been negligible in recent years. This was perhaps inevitable in the light of the decision not to hire core faculty members who traditionally have responsibility for both research and teaching. Nevertheless, this critical absence allowed sister universities to denigrate BCOU as not being a "real" university.

Leadership

To very differing degrees, interviewees considered that the leaders' intercommunicative styles at both TÉLUQ and OLA had played an important role in the decisions to reconfigure open learning in their provinces. In the case of TÉLUQ, the previous director general was credited with having been proactive in making TÉLUQ confront the problem of its survival and for having led the organization in its pursuit of a special relationship with a sister institution, even if, in the end, the director general was not herself prepared to support the final arrangement. In contrast, the faculty, in particular, judged her successor as having contributed remarkably to managing the processes that gave rise to the details of the protocol agreement. The fact that TÉLUQ survived the

1990s and was strong enough in its own eyes, and in those of the government and sister institutions, to arrive at its new status as a "university within a university"—even though the previous director general would have held out for a more formal institutional status—was considered by several interviewees as a positive result of her leadership and relationship building with government and sister institutions. This is so, even while others judged her as perhaps having paid insufficient attention to government relations and to ensuring that government fully understood TÉLUQ's role and accomplishments (a perspective that stands in contrast to the overwhelming 90 per cent internal support that the previous director general received for a second mandate). Finally, the UQAM rector was considered by all interviewees as having demonstrated considerable vision and leadership in this dossier, even though there is a lingering concern about whether the UQAM faculty will truly buy into the model of a dual-mode university that favours both distance and open education, thereby ensuring that the vision outlives his time as rector.

At BCOU, however, interviewees were all but unanimous in criticizing the last OLA president's relationship with government and with university and college presidents. Rapport with the civil service was at an all-time low (though the previous president was also considered by some as having insufficiently promoted BCOU's accomplishments and role with government). Before the core review was undertaken, Soles (who became assistant deputy minister after the core review) reported that government had already flagged OLA and a couple of other institutions and was intent on taking a long, hard look at their usefulness and cost-effectiveness. While recognizing the difficult challenge that working with other educational leaders posed, poor relations with colleagues at senior levels, in the minds of many, contributed to the demise of OLA and BCOU. Given that the core review was intended to lead to system rationalization, the fact that other institutions encouraged the civil service as it went after OLA was significant in the eyes of Soles, the new deputy minister of post-secondary education: "None of the post-secondary groups or institutions that had significant influence with government came to bat for OLA; quite the

contrary in fact. . . . Five years earlier OLA's breakup probably would not have happened. Though a few would have wanted OLA gone, overall it would have been neutral."

6.ii. Their New Status within Dual-mode Universities

With the recent mergers, the future of open and distance learning in both Quebec and British Columbia is now much more dependent on institutional mission than government mandate. Increasingly, and inevitably, this emphasis on mission rather than mandate will give rise primarily to internal key performance indicators and self-imposed measures of success, as the new dual-mode institutions will be much less directly accountable to government for ODL than were their previous single-mode component parts. Moreover, without strong, dedicated institutional advocacy, the ODL agenda is itself unlikely to attract much government attention, and considerably less comprehension than before—both issues that the interviewees considered to have already been problematic in the past.

This being the case, the organizational status and modus operandi that ODL has established within the new organizations will prove to be critical in the medium- and long-term if learners in those provinces are to continue to access high-quality, open, and distance learning.

Governance

Notwithstanding previous governance-related shortcomings, the new legislation has further reduced the legislated obligations to deliver ODL in both new institutions. If high-quality ODL services are to continue to be provided, they will have to be able to rely on a strong internal governance model to protect and advance the interests of open and distance learners.

In juxtaposition to the path chosen by TRU (integration and absorption),[23] UQAM-TÉLUQ has done everything possible at the institutional level to ensure that ODL was well represented at the different academic, management, and governing board decision-making bodies. Instead of having a university (TÉLUQ) within a system (UQ), we now have a university (TÉLUQ) within a university (UQAM) within a system (UQ).

Insofar as institutional independence is concerned, both institutions under their new governance models have intentionally minimized the impact that their in-province sister institutions can bring to bear on their strategic direction setting. In the case of TRU, not only does the Planning Council for Open Learning have very limited powers, but the representation from other institutions in British Columbia is significantly less than was the case at BCOU, where external academics dominated the Academic Council and the Open University Planning Council.

Similarly, under the new UQAM-TÉLUQ governance model, the Academic Council for Distance Education, which has the power only to recommend to its UQAM counterpart, is comprised solely of UQAM appointments, the vast majority of whom are from TÉLUQ, while the Université du Québec Distance Educational Council, a new consultative body, has only the power to seek out areas of co-operation.

This notwithstanding, in both instances the new models assign to the mother institution the formal, ultimate decision-making responsibility for practically all governance-related matters. Decision making in ODL matters is thus assigned to academic and governance bodies that are dominated by appointees who are most unlikely to have any particular interest, or expertise, in ODL.

[23] Given the absence of academic staff at the BCOU, this is probably a forced choice as far as academic responsibility is concerned.

The same is also now true at the provincial level whenever the University Presidents' Council of British Columbia, or its counterpart in Quebec, meet to provide government with system-wide advice, for example, on university funding or new programming proposals.[24]

Internal Autonomy

While the existence of TÉLUQ as an organizational subcomponent of UQAM is legislated, very few of the details as to what this means are reflected in the legislation. Consequently, the nature of their "university within a university" status remains an internal matter, even if the protocol agreement assigns to TÉLUQ a great margin of academic, administrative, management, and financial independence from UQAM.

In contrast, TRU has opted for maximum integration of open learning and campus-based education provision, and the absence of academics in the BCOU model means that the academic management, administration, and financing of open and distance learning has all but been integrated within the existing campus-based structures. Exemplary of the integration process are President Barnsley's words: "When people ask me about the open learning courses, I say that there are differentiated open learning programs, but all courses, whether delivered face to face or at a distance, are considered equivalent. All courses and programs at TRU have a home within an existing faculty." One interviewee identified precisely this intentional blending as likely to pose a major marketing problem and as the primary reason for TRU-OL's inability to correct the continued downward plunge in enrolments during the first year of the takeover.

[24] At the same time, the Protocol agreement calls for attempts to have the Conférence des recteurs et des principaux des universités du Québec (Conference of Rectors and Principals of Quebec Universities, or CREPUQ) give non-voting status to the TÉLUQ's director general.

Open Learning and Flexible Delivery

In contrast to the situation at TRU, all of the characteristics of TÉLUQ's flexible delivery system are protected, at least for the foreseeable future, by the "university within a university" operational model adopted by UQAM-TÉLUQ. Any attempt to change the openness paradigm would result in serious confrontation, not only with TÉLUQ's academic staff, but also with its administration, because flexible, student-centred learning underpins, differentiates, and defines this organization's institutional culture. Aspects of openness and flexibility that were hard fought for in some of the sector negotiations, ultimately leading to the protocol agreement, have been protected as much as possible in light of the fact that TÉLUQ has lost its own university patent.

At TRU, however, a review of "openness" is already underway, with the emphasis being on protecting programmatic characteristics of open learning (open admission, minimal residency, credit coordination/consolidation, and credit banking) while challenging open features of BCOU's distance delivery (uncapped, year-round and self-paced course enrolment). The integrated academic organizational structure, the absence of BCOU academics, and the very limited powers of the Planning Council for Open Learning (in contrast to the non-legally binding MOU that preceded the *TRU Act*) are key factors in facilitating this review.

Course/Program Development and Delivery

The two new institutions are also taking very different paths in determining which programs and courses to focus on in the future. At TRU, there is no commitment to continue to offer the old BCOU curriculum indefinitely (that is, through the next revision cycle) and courses also being offered at a distance by other British Columbia institutions may be dropped at TRU in favour of more distinctive, program-driven curriculum. Similarly, there is no commitment to increase the overall inventory of distance-delivered courses. At the new TÉLUQ, on the other hand, the strategic decision to turn UQAM into a real

dual-mode university at which a significant number of resident students mix and match their on-site and distance-delivered courses has resulted in a commitment to very significant new course and program development, with no intention of eliminating TÉLUQ courses as they come up for revision.

The course development and delivery models for distance or online courses will also differ significantly between these two universities. Though several interviewees wondered how long this could last given the overpowering and dominating UQAM culture, TÉLUQ course development planning is premised on the continuation of the specialized, multimember course team approach, where all participants are, in principle, considered as equally important to the development process. UQAM academics interested in working on course teams will have to work within TÉLUQ's model and structures, and more often than not will be seconded for that purpose. Distance courses will be offered by TÉLUQ, not by the regular faculty, and different student management and administrative systems will result in the maintenance of TÉLUQ's former processes and professionally driven delivery model. At TRU the opposite approach is being implemented, with specialized BCOU development and delivery models being subsumed by campus-based academic faculties, practices, and cultures, albeit with specialized professional support from the Instructional Development and Research Group.

7. The Future of Open and Distance Learning

7.i. Thompson Rivers University – Open Learning

Signs point to a significant change in the availability, through a provincial provider, of what used to be considered ODL courses in British Columbia. Of foremost importance is the consideration currently being given at TRU to a rethinking of three key aspects of BCOU's related practices: continuous, self-

paced, and uncapped course registration. Interviewees offered different, though complementary, reasons for a possible redefinition of ODL at TRU: the administrative complexities and costs of indefinitely maintaining two student management systems, or of developing and managing one that could deal with both sets of requirements; the fact, supported by distance education research, that self-pacing negatively affects completion rates; the experience of the United Kingdom's Open University, and other mega-universities, where self-pacing and continuous enrolment are not available options; and the predominantly unchallenged dominance of the traditional academic culture at TRU.

At issue, moreover, is not only how distance learning will be delivered, but also what courses will be accessible through TRU-OL in the long run. Whereas BCOU's university offerings far exceeded their college-level courses, and they considered visiting students who had difficulty accessing flexible learning options at their home university to be an important client group, several interviewees anticipate that TRU would shift this focus and seek to establish a strong presence in niche programs particularly in the trades and applied areas. The fact that TRU questions BCOU's strategy of targeting visiting students, and is moreover contemplating dropping from its own offerings (as they need revision) courses that are also offered at a distance by other British Columbia institutions, supports this hypothesis. A significant curriculum rationalization on the basis of comparable offerings elsewhere in the province could not be undertaken without a concomitant revision in the definition of ODL, as most competing in-province providers provide their courses in paced, semester-based format.

Undifferentiated product branding was also advanced as an important factor contributing to what many, but not all those interviewed, considered as the inevitable conversion of BCOU from a provincial ODL institution into the distance education branch of TRU. Several interviewees expected that combining course and program promotion and marketing for both campus and distance delivery could affect the marketability of its offerings to visiting

students and non-traditional adult learners. Similarly, the adoption of a course development and delivery model that assigned line responsibility for these tasks to the regular faculties rather than to distance education specialists, and the concomitant lessening of the quality of the learning experience that certain interviewees associated with this shift, was also cited as a shift towards undifferentiated product branding—undifferentiated, that is, from other provincial providers.

Predictions of a gradual redefinition of open learning at TRU, such that the volume, range, professional quality and flexibility of its distance education courses would be considered less important than the programmatic characteristics of an open learning system (credit banking; credit coordination; little or no residency; open admission and minimal prerequisite regulations), were supported by the following key factors affecting the acquisition and the subsequent integration of BCOU into TRU:

- UCC did not respond to the original EOI and, when that process failed to arrive at satisfactory arrangements with an applicant, it was at the Ministry of Advanced Education's request that UCC became interested in acquiring BCOU.
- UCC had for some time been lobbying for university status and this, rather than a significant expansion into ODL, had been its strategic goal.
- In approaching and ultimately finalizing an agreement with UCC, it seems the Ministry of Advanced Education ignored, or at least downplayed, its declared intention in the EOI to transfer the operations of BCOU/OC to an institution "with significant experience in distance education."
- A comparison of the *OLA Act* and the *TRU Act* shows that open learning is much better protected in the former than in the latter.
- Severely watered down in the *TRU Act* was the intention, agreed to in the MOU, that a second academic council, similar to the one in existence at

BCOU, would be established under the TRU legislation in order to protect the quality and openness of BCOU courses and programs.

- TRU made a managerial decision to maximally integrate responsibility for its distance education curriculum development, delivery, and promotion within existing organizational structures.
- With modest enrolment target growth for distance education during the next five years (as confirmed by interviews and the MOU), which basically amounts to compensating for OLA's drop in funded enrolments over the past several years, TRU is not expecting to make any real distance education market share gains during this period. As such, it will not be significantly distinguishable—by reason of total volume of distance education registrations—from other major dual-mode providers in British Columbia.

As long as British Columbian students are able to access truly flexible distance-delivered courses and programs elsewhere (and several respondents believed that the market for ODL is only big enough in Canada for one English-language open university), and as long as these courses and programs are relevant and affordable, such a predicted shift in direction need not be of concern to the regional post-secondary education system. In such a scenario, moreover, both UCC's overarching desire to become a university and the Government of British Columbia's very real need to not turn the disbanding of OLA into a political quagmire would have been addressed with minimal economic,[25] social, and educational consequences.

[25] In addition to one-time transition dollars, TRU sees its UCC government grant increased more or less by the same amount as BCOU received the year before amalgamation ($10–12 million), though actual enrolment figures three years hence may affect this forecast.

7.ii. Université du Québec à Montréal/ Télé-université

In sharp contrast to the situation in British Columbia, it seems the Province of Quebec has strengthened its commitment to provincially delivered ODL courses and programs, at least in the medium term. Interviewees, almost to a person, reflected this view and attributed it to the following factors:

- The decision to merge with UQAM was requested by both of the concerned institutions and was not triggered by politicians or civil servants.
- A very detailed protocol agreement was developed that defines the terms of the merger, and which TÉLUQ specialists in ODL (administrators, faculty, and professionals) believe will result in a brighter future for ODL within UQAM than TÉLUQ was ever able to achieve as a single-mode ODL institution.
- TÉLUQ staff are defined by their strong commitment to ODL, and they believe this is a critical asset that will transcend the merger.
- The commitment and leadership of UQAM's rector is aimed at turning that institution into a first-class dual-mode university.
- The concept of "a university within a university," with high levels of administrative, financial, and (to a lesser degree) academic autonomy, underpins the protocol agreement.
- Within the concept of "a university within a university," TÉLUQ's centralized course development and delivery models are preserved.
- The new relationship with UQAM makes possible ambitious expansion plans, both in terms of curriculum development and enrolment growth.
- There is an inherent ability in the home institution, UQAM, to better protect TÉLUQ's interests vis-à-vis other members of the UQ system.
- The value of a UQAM credential is greater than a UQ-TÉLUQ one, which makes students the big winner in the merger.

- UQAM's higher institutional credibility will be transferred to TÉLUQ.
- A more cost-effective ODL model will result primarily from increased economies of scale and lower administration costs (when some TÉLUQ senior management functions are subsumed under UQAM positions).

Respondents identified the following concerns, however, for the long-term viability of ODL in its new home:

- the loss of TÉLUQ's government patent and, hence, its independent institutional status and legal autonomy
- the implication on governance (e.g., the Academic Council for Distance Education's legal authority to make only recommendations to UQAM's overarching Academic Council)
- the implications on management (TÉLUQ senior administrators will become less accessible, and decision making will be more complex and time-consuming given that it will often have to involve UQAM officials)
- the overdependence on institutional leadership, both at UQAM and at TÉLUQ, to maintain the terms of the protocol agreement and, hence, both the "university within a university" modus operandi concept and the commitment to expanded curriculum development and enrolment growth
- the belief that the commitment of UQAM's rector to distance education is far from reflected throughout the rest of the organization
- the power of traditional UQAM faculties and their willingness to support and facilitate the structures and strategic objectives identified in the protocol agreement
- the willingness of the UQAM faculty union to either support the existence of a parallel TÉLUQ faculty union or defend the latter's interests in the case of an amalgamation
- an inevitable slide, over time, from a partnership between two equals to assimilation by UQAM

Notwithstanding these concerns, there is a strong air of confidence in TÉLUQ's future and quasi-unanimous agreement that ODL is better positioned to flourish in Quebec under the UQAM flag than was the case when TÉLUQ had the status of a struggling, independent, autonomous institution. In the words of several interviewees, a merger would not have been preferred in the best of all possible worlds; but, for reasons particular to its own situation, TÉLUQ's future was at risk prior to its association with UQAM. Even if one must now contemplate longer-term vulnerabilities, failing to take drastic action would have had much more severe short- and long-term implications for ODL in the province of Quebec.

8. Lessons to Be Learned

While each of the two case studies is idiosyncratic and distinctive, a comparison of the evolution and reconstitution of these institutions highlights common and diverging elements. The lessons of their experience can be considered of value for the organization, development, and management of post-secondary open and distance education in general, be it in single-mode, medium-sized ODL universities, or dual-mode institutions that ascribe a significant importance to ODL.

Small and medium-sized ODL institutions must recognize their inherent vulnerability.

Small and medium-sized, publicly funded ODL institutions must recognize that their size, nature, and non-conformity to traditional academic input and output measures leave them continuously vulnerable to the vagaries of government and collegial support in a way that is quite unlike the vulnerabilities of either their mega-ODL counterparts or traditional institutions. As levels of public funding are increasingly unable to match higher accessibility targets, as traditional institutions progressively seek to compete in the distance education market

either individually, through consortia, or in both ways, and as out-of-region providers (including mega-providers) seek to take advantage of borderless education opportunities to gain greater economies of scale, this exposure will only increase. It behooves single-mode ODL organizations to recognize this intrinsic liability and to develop and implement key strategies that can help mitigate against this limitation. This being the case, and without downplaying the role that local strategies own, the other lessons to be learned from the two case studies assume even greater importance.

Relations with government(s) are of primordial importance.

While sound government relations must be key to the success of any public university, nowhere is this more true than in the case of medium-sized ODL institutions, which are much less able than are traditional universities, or even mega-ODL universities, to muster other financial support and/or lobbying power, be it from students and alumni (who are well-dispersed geographically); local government and businesses (since the economic impact of such an ODL is much less than a campus-based organization of the same size); the private and corporate sector (which likes to support bricks and boards to which they can attach their name, or applied research that matches their corporate interests); or sister institutions and their representative politicians (who may feel threatened).

This, together with the fact that ODL institutional inputs, outputs, key performance indicators, and business models can be significantly different from those generally associated with post-secondary education—and with which government officials and politicians are familiar—heightens the importance of ongoing and meaningful government relations.

Relationship building with sector institutions is critical.

Notwithstanding the competitive nature of the educational workplace, and while recognizing that sister institutions may neither fully understand nor appreciate

their ODL counterparts (or even have supported their establishment), ODL institutions must cultivate the relationships with their sister institutions in order to advance both their own institutional and academic credibility. Sister universities are best positioned to validate and promote the academic rigour of an ODL institution's courses and programs, as well as the importance and relevance to the educational system of its special mandate and purposes.

To be most successful, this relationship building must be conducted across all levels of the organization: by faculty members (whose teaching and research interests coincide with those of their counterparts at other universities in the system); by professionals and managers (whose expertise and challenges must be institution-specific); by senior executive (who, in addition to the challenges particular to their own institution, share with their counterparts elsewhere the responsibility for the entire system); and by board members (whose fiduciary responsibilities are no different than those at other universities).

Inter-institutional collaboration is a double-edged sword.

Inter-institutional collaboration can represent a particularly important means of relationship building between an ODL institution and sister institutions, as well as between these institutions and government. Such collaborations, however, are generally entered into for very different reasons, including the desire to build on (or compensate for the weaknesses of) the personnel strengths of the collaborating organizations (for example, in course development); to better manage resources (for example, by acquiring or leasing courses); to generate revenue (for example, by selling courseware); to avoid program and course duplication (curriculum rationalization); or to better serve learners (for example, through mixed-mode delivery and/or by providing face-to-face local support).

While meaningful collaboration is usually positive in principle, it is difficult and time-consuming to achieve and can also increase the "at risk" nature of the ODL institution. Most noteworthy in this respect is the sharing or leasing of

courseware, which—though often advocated and even mandated by government—can easily result in a public, single-mode ODL institution assisting its competitors and thereby undermining its own ability to create significant economies of scale.

Also of potential concern are situations where the institution with the most at risk (for example, in the case of a dedicated ODL institution, its core business) has the responsibility of running or administering a consortium or multi-partner collaboration. Finding common ground may come at too-high a price for the ODL institution; or competitive positioning will outplay collaboration; or added value for some or all of the participants will be limited to the lowest common denominator that still protects those partners who are most vulnerable.

Cultivate communities of learners and alumni.

Notwithstanding the special difficulties that ODL institutions may face in developing and supporting their communities of distant learners and alumni, the individuals in these constituencies are often the most appreciative of the opportunities that the ODL institution has allowed them. Their collective voice, then—if heard—can be very persuasive. In addition to the important contribution that organized student and alumni voices can play in advising on day-to-day governance and academic affairs, the relative shortage of external advocates for institutionalized ODL means that opportunities such as these must be seized and developed with this purpose in mind.

Governance structures must maximize institutional autonomy, credibility, and flexibility.

It is not sufficient for governments to create ODL universities as part of the solution to more affordable and accessible post-secondary education. It also behooves government to enshrine ODL institutions with governance models that maximize autonomy, credibility, and institutional flexibility. Failure to do so will restrict the ability of such institutions to overcome the steady flow of

unusual political, collegial, academic, and business challenges that their non-traditional, non-conformist status inevitably gives rise to. Single-mode ODL universities will be best positioned to succeed over time if their governing bodies facilitate the following (*inter alia*):

- institutional autonomy
- academic autonomy
- engaged participation by public trustees
- institutional flexibility, timeliness, responsiveness, and accountability

While there is a tendency to counter inherent concerns either about the academic credibility of ODL universities or about system rationalization by appointing academics and/or administrators from sister institutions to ODL institutional governance and academic bodies, the impact on institutional autonomy or flexibility must be weighed against foreseen advantages.

Faculty members are key to the recognition of a university.

Faculty, and the quality of their teaching and research, are considered to be a key component (if not *the* currency) of academic credibility and reputation. This being the case, ODL institutions that seek to be part of a public system of education must ensure that they avoid the economically attractive alternative of subcontracting all, or most, of their academic work. This does not mean that faculty appointments should be proportional to numbers at campus-based universities where the teaching model is much more labour-intensive, but rather that the added value that only academics can bring to a university be respected and considered core organizational assets.

An important offshoot of the inevitably lower proportion of faculty members in small and medium-sized ODL universities is the reduced visibility of the research generated in these institutions (even if on a per-faculty member basis,

research output may be greater than at conventional universities). Partial solutions to this shortcoming involve the development of research centres of excellence, particularly in the area of the institution's special mandate, and joint research projects with academics at other universities.

Increase, or at least capture, market share through core product differentiation.

When faced with similar distance education products available at comparable costs, learners are likely to first look towards local providers and recognized brand names (whether or not the branding has resulted from distance education excellence) before turning towards other regional institutions. Given the fact that campus-based institutions are increasingly expanding into the delivery of distance education, and thus not only adding to the competition but also to the size of the market, small and medium-sized ODL universities are today even more vulnerable in their attempt to maintain or increase market share, a key factor in their ongoing success.

Though not guarantees of future success in and of themselves, two complementary and primary differentiating strategies are available to small and medium-sized ODL universities that operate in a competitive environment: the provision of value-added differentiating services, and the development of a recognizable brand. The first can be achieved by assigning as much importance to the *open* as to the *distant* in ODL and involves flexible admission criteria; program regulations (recognition of prior learning; block transfer; residency; time to completion); course design (individualized and self-paced learning modules; minimal course prerequisites); course availability (uncapped and continuous enrolment); and responsive institutional structures (for approval of new programs; learner-centred academic regulations; and continuous improvement). The second strategy, recognizable branding, can be achieved by emphasizing *quality*, not just in academic content and exchange, but in all

student support services, so that learners are treated more and more like valued customers.

Whereas traditional universities may be able to compete on the grounds of academic quality (or at least perceived academic quality), the organizational culture required to support open learning and customer-focused service is quite antithetical to traditional academia and provides an opportunity for dedicated ODL universities to differentiate themselves from local dual-mode providers.

Develop and entrench scalable models of program development and delivery.

Given government expectations that less funding is required for ODL, and the assumption of economies of scale that underlies most if not all ODL university business plans, these institutions must develop and entrench scalable modes of program development and delivery. Moreover, ODL institutions need to increasingly anticipate and plan for sporadic, yet highly significant, investment in technology.

Nor can scalability significantly limit an ODL university's range of offerings. In order to be credible, well-branded, stand-alone ODL universities should offer the range of programs and courses that students (and colleagues in academia) associate with the status of a degree-awarding institution. For a medium-sized ODL university, increasingly this means undergraduate liberal arts, sciences, management, and applied disciplines (for example, nursing); and graduate programs, at least to the master's level. Not only do graduate studies enhance the credibility of undergraduate offerings, but the escalation of credential requirements in the workplace has resulted in a large number of working professionals requiring flexible, open and distance education at higher levels. An added, incidental advantage is that these are the very graduates who can, over time, enhance the ODL university's standing with government, employers, and even other sister institutions in the system.

Leadership is a critical factor to success.

Institutional leadership is considered by Daniel (2004) as one of the six ingredients of sustainability in open and distance learning. It assumes a particularly high level of importance in medium-sized ODL universities, given the complexity of the organization and the means of achieving its mandate; the conflicting marriage of academic and entrepreneurial cultures that can prove to be either a great strength or a critical weakness; and the need for continuous change and repositioning (if not in order to exploit a new opportunity, then often in reaction to new technological applications, or significant encroachment by other institutions into mission-critical areas hitherto considered as the protected area ODL institutions).

If the educational leader's role is centrally concerned with persuasion (Latchem & Hanna, 2001), in ODL it must be rooted in high-level knowledge of the ODL business, and in interaction and relationship building with the internal constituencies (staff, students, alumni), sister universities and colleges, civil servants, and elected officials. Whereas excellent leadership is no guarantee of the survival of an ODL university, the absence thereof can bring about its rapid demise.

It could be said (with apologies to Mark Twain) that the death of single-mode institutions has been greatly exaggerated. Today more than ever, however, these institutions must accept and address their inherent vulnerabilities and add differentiated value to the educational marketplace by emphasizing the "open" rather than the "distant" in ODL, thereby responding to students' ever-increasing needs for highly flexible, open learning.

Appendix A:

Detailed Summary of the Formal Documentation Annexing TÉLUQ to UQAM

A.1. Legal Framework: Decree of Government of Quebec, 464-2005

By a Government of Quebec decree that came into effect on October 26, 2005, TÉLUQ's patent was revoked and UQAM's was amended with the following results.

Article 1

- UQAM establishes and maintains in Quebec City an entity ("composante") that is called the Télé-université de l'Université du Québec (TÉLUQ).
- TÉLUQ is responsible for university-level teaching and research and is mandated to offer UQAM's distance education activities and to promote the development of distance education within the UQ.

Article 2

- UQAM retains and develops TÉLUQ's property and assets and provides all material and human resources necessary in the fulfillment of its mandate.
- TÉLUQ's head office is located in Quebec City.

Article 3

- UQAM establishes a management council for TÉLUQ with responsibility for strategic and financial planning and administrative control.

- In matters relating to TÉLUQ's mandate, the Administrative Council of UQAM ("conseil d'administration") must seek recommendations from the TÉLUQ Management Council ("conseil de gestion") before taking any related action.

Article 4

- UQAM establishes an Academic Council for Distance Education ("commission académique de la formation à distance") responsible for determining programs and projects in distance education.
- In matters relating to TÉLUQ's mandate, UQAM's Academic Council ("commission des études") must seek recommendations from the Academic Council for Distance Education before exercising its own authority.

A.2. **The Protocol Agreement**

About 150 members of both institutions worked through various committees at elaborating the terms of reference (legal, academic, organizational, and financial), deliberations that resulted in a draft protocol agreement (November 2003). In turn, this document was openly discussed by both universities before it was submitted to each institution's governing bodies for sign-off (May and June 2004).

Since the protocol agreement is not referenced in any way by the Government of Quebec decree amending UQAM's patent, its authority is primarily institutional and collegial and results from extensive grassroots consultation, creative thinking, and consensus building.

The following describes the core elements of the protocol agreement.

Preamble

- creates an institutional framework that promotes distance education and forms the basis for a large dual-mode public university that will expand learning opportunities for UQ system students
- builds both on the evolving university trend of combining campus-based and distance education, and on UQ's commitment to access
- recognizes the desire of both institutions to combine their efforts to maximize the benefits of distance education both within the UQ system and within Québécois society in general
- provides TÉLUQ with enriched programming, a large academic staff, and an expansive student base
- commits to formalizing a complementary relationship between TÉLUQ and other UQ member institutions
- recognizes that the goals and objectives can best be attained by maintaining TÉLUQ's arm's-length and distinct organizational form and by creating formal links between the institutions' governing, academic, and administrative bodies

Objectives

- to consolidate distance education within UQ and improve the system's capacity for researching, creating, and delivering related activities both within system institutions and internationally; and to conserve and dedicate all TÉLUQ's assets for this purpose
- to provide significant added value to the provisions of university education
- to improve access to university education
- to maximize the combined strength of on-campus and distance education
- to vitalize research
- to contribute to the renewal of pedagogy at universities

- to develop a community service-related mission

Patent

- commits both institutions to request that government amend UQAM's patent and rescind TÉLUQ's such that (*inter alia*) TÉLUQ's head office remain in Quebec City and its assets be handed over to UQAM

Human Resources

- maintains all employment, and terms and conditions of employment, then in effect (including location of work)

Organizational Structure of TÉLUQ

- maintains the integrity of TÉLUQ's organizational model, as well as TÉLUQ's visibility, while adapting composition, role, and responsibilities
- replaces TÉLUQ's Administration Council with a management council, which now includes the UQAM president and one representative from another UQ institution
- replaces TÉLUQ's Academic Council with the Academic Council for Distance Education, which has (minority) representation from UQAM and one representative from another UQ institution appointed by the UQ Council for Distance Education (The new body has only an advisory role, as all programming decisions and academic regulations are made by the UQAM Academic Council.)
- maintains the previous academic and research units and assigns to the TÉLUQ Management Council the responsibility for any future changes in this area
- appointed by the UQ Council for Distance Education
- renews the composition of the senior executive
- requires that any future changes to TÉLUQ's organizational structure and/or mandate, or to any other area covered by the protocol agreement, be approved by the TÉLUQ director general and the management council

Distance Education Development Plan

- commits to the development of a distance education plan that increases the reach and quality of distance education, and (*inter alia*)
- targets national and international growth in the number of courses and programs taught at a distance or through a mixed-mode delivery
- requires that the existing expertise of instructors, tutors, professionals, and other categories of staff be preserved, consolidated, and built upon, and that partnering with other UQ institutions take this into account
- commits to the future development of resources dedicated to development and delivery of distance and dual-mode courses
- advocates the sharing of courseware and other resources for teaching and learning
- stimulates distance education networks of expertise
- by combining the potential of both institutions, promotes research ("recherche-creation") and the use of new pedagogies and technologies

Research at TÉLUQ

- maintains current levels of funding and infrastructure
- commits to exploring ways in which TÉLUQ faculty can access UQAM's infrastructure in support of research

Governance Participation

- the TÉLUQ director general is a member of the UQAM Administrative Council
- TÉLUQ membership on UQAM Academic Council consists of the director of teaching and research; one professor appointed by and from the professoriate; and one student appointed by and from the student body

- the TÉLUQ director general participates as a full member of all UQAM presidential committees where the vice-presidents and the secretary general are members

Financial

- in exercising its mandate, TÉLUQ is guaranteed by UQAM a budgetary allocation at least equal to that which it would have had as an independent institution within the UQ system. The setting of this budget shall be by mutual agreement and shall take into account both the Ministry of Education's investment and revenue from the indirect cost of research.

Agreement with the Other UQ Institutions

- documents the intention to negotiate a partnership agreement with the other UQ institutions in a way that would ensure the development of distance education throughout the UQ system
- once adopted by the UQ planning commission, the implementation of the partnership agreement will be assigned to the UQ Distance Education Council, a new body with membership from each institution, co-chaired by TÉLUQ's director general and one member from another UQ university who is appointed by the UQ Distance Education Council

TÉLUQ Director General's Representation on External Governance Boards

- TÉLUQ and UQAM agree to seek representation by the former as an active, non-voting member at meetings of the UQ Governing Assembly and the administrative council of the Conference of Rectors and Principals of Quebec Universities

A.3. Annex to the Protocol Agreement: Framework for the Development of UQAM-TÉLUQ Distance Education 2005–2010

This document constitutes an appendix to the protocol agreement and targets the following:

- a doubling of TÉLUQ's FLE count within five years, to be attributed to
    - 900 new FLEs as a result of UQAM students taking TÉLUQ courses as part of their UQAM program (assumption: on average, half the UQAM students will take one TÉLUQ course per year by 2010)
    - 600 new FLEs as a result of UQAM attracting new students directly as a result of it having become dual mode
    - 100 new FLEs enrolling in TÉLUQ programs because of the added market value of a TÉLUQ credential awarded by UQAM
    - 600 new FLEs as a result of new courses and programs offered either at a distance or by dual modal by UQAM-TÉLUQ
- an increase in TÉLUQ course offerings from 325 to 500 by 2010. This projection is based on
    - UQAM supplementing TÉLUQ's resources by some $10 million in kind contribution (staff, technological and/or administrative support)
    - an average direct course cost of $200,000
    - 10–15 additional courses per year to be developed by UQAM faculty (TÉLUQ will continue to develop about another 15 course per year with its regular resources.) Combined activity represents a doubling of course development

- harmonization of programs and of academic management
- coordination of promotion and recruitment, and the integration of TÉLUQ into the UQAM institutional image
- pathways for staff mobility across UQAM-TÉLUQ, particularly for the professoriate and sessionals
- interesting UQAM faculties, departments, and the professoriate and sessional staff in distance education. As a means of encouragement, UQAM students enrolled as part of their program in distance education courses will continue to be recognized and counted by their own department, program and faculty. These students will be counted and reported as UQAM students for the purposes of funding allocations, the exact (progressive) formula to be agreed to subsequently. At a date yet to be agreed upon, UQAM will limit its additional TÉLUQ funding to a per-registration allocation, equivalent to the average cost of delivery support.

A.4. Partnership Agreement for Developing Distance Education within the UQ System

Signed off by the UQ in June 2004, this document is referred to in the protocol agreement and seeks to define how, through coordinated action, the UQ institutions can collaborate to advance the role of distance education within the UQ system. This partnership agreement

- established the UQ Distance Education Council, co-chaired by the TÉLUQ director general and by and one member from another UQ university appointed by the UQ Distance Education Council, and comprising one representative from each UQ institution and one from the UQ administration. Reporting in an advisory capacity to the UQ planning commission, this committee

    - oversees the coordination of the institutions' distance education activities, promotes joint course and program development and delivery, and monitors the clientele served.
    - upon the recommendation of the UQ president, appoints one representative to each of the TÉLUQ Management Council and the Academic Council for Distance Education.
    - annually reviews the institutional plans for developing distance education with a view to promoting joint projects and gaining UQ system support.
- creates a learning object repository.
- provides the framework for UQ system institutions to share the distance education courses at rates that will be agreed to on a case-by-case basis but that will only seek to reimburse the provider for development-related costs.
- stipulates that, when desired by another institution, TÉLUQ may be contracted as a delivery agent at a rate that covers its delivery-related costs.
- stipulates that, in order to promote transfer knowledge among UQ institutions, the means and ways of facilitating temporary assignment of one institution's staff to another will be determined.
- stipulates that revenue-sharing arrangements for staff who are entitled to receive revenue as a result of their involvement in inter-institutional development or delivery projects will be determined.

Appendix B:

Interview Instrument

Recent Mergers of Two Single-mode Distance Universities into Dual-mode Institutions: Are the Times a-Changin'?

Introductory Statement: Thank you for having agreed to participate in this research project, which seeks to better understand the governmental and institutional variables, and their relative importance, that were at play in determining the future of two Canadian single-mode distance education universities: BCOU and TÉLUQ.[26]

A review of the literature suggests that there are at least four interrelated areas that help differentiate single- and dual-mode universities:

- cost structures and costing methods for distance education in single- versus dual-mode institutions
- different course development models that impact the efficiency, cost, and quality of distance education courses and programs
- institutional culture and governance models
- relative institutional weighting of teaching and research activities

Our research team also recognizes that there are significant pressures that may affect the political (internal and external) viability of single-mode distance universities. These include

- the perceived status of single-mode distance universities in general, and specific institutions in particular.

[26] This interviewing instrument was administered in English and in French. For reasons of concision, only the English version is reproduced here.

- the perceived effectiveness and added value of open distance learning to a particular post-secondary institution and system.

We appreciate this opportunity to explore with you your thoughts about how the aforementioned factors may have affected decisions about the future of BCOU/TÉLUQ.[27] Our interview will take less than one hour.

[27] Where BCOU/TÉLUQ is used in this questionnaire, the interviewer will select BCOU or TÉLUQ, depending on the interviewee's field of knowledge and experience.

Questionnaire

Demographics

Name: _____

Date: _____

Current title and workplace: _____

_____

Previous title (if relevant): _____

_____

Please describe your role in the decision to amalgamate, or your role in the administration of the amalgamation?

_____

_____

_____

_____

Area 1: General

1. What were the stated goals underlying the amalgamation with another institution?

   _____

   _____

   _____

   _____

2. How likely do you think this amalgamation is to achieving these goals?

   _____

   _____

3. Do you believe that there were unstated goals and, if yes, what were they?

   _____

   _____

   _____

   _____

4. What unanticipated outcomes of the amalgamation, either positive or negative, do you believe are likely to result?

   _____

   _____

   _____

   _____

5. How externally driven was the decision to amalgamate the institutions?

   _____

   _____

Area 2: Institutional Stability and Credibility During the Past Five Years

6. How stable or vulnerable an institution do you believe BCOU/TÉLUQ to have been during the ten years preceding the amalgamation decision, and is there documentary evidence to support this assessment?

_____

_____

_____

_____

7. How aligned do you believe the unique programming and operations of BCOU/TÉLUQ to have been to the provincial government's vision of the post-secondary system?

_____

_____

_____

_____

8. How supportive of BCOU/TÉLUQ was the provincial government during the past five years?

_____

_____

_____

_____

9. How supportive of BCOU/TÉLUQ were sister provincial institutions? [Open-ended question]

_____

_____

_____

_____

_____

_____

10. Do you consider BCOU/TÉLUQ to have been a credible institution in the eyes of its sister provincial institutions? Why, or why not? [Probe for credible answer in terms of teaching/learning; research; and service.]

_____

_____

_____

_____

11. Do you believe that the new combined institution will be more or less credible after the amalgamation as judged by the following groups?

    a. Students:

    More credible Same Less credible

    1 2 3 4 5

    b. Tax payers:

    More credible Same Less credible

    1 2 3 4 5

c. Governments:

More credible		Same		Less credible
1	2	3	4	5

d. Other educational institutions:

More credible		Same		Less credible
1	2	3	4	5

12. How do you expect the activities previously offered through BCOU/TÉLUQ to be affected by the amalgamation?

_____

_____

_____

_____

_____

Area 3: Value Added by Institution's Commitment to Open Distance Learning

Single-mode distance education institutions are more likely to embrace FLEXIBLE (less residency, more time and place shifting possibilities, OPEN (no or few prerequisites) learning models than are dual-mode institutions.

13. How important was BCOU/TÉLUQ's FLEXIBLE, OPEN mandate to government?

_____

_____

_____

_____

14. How important was BCOU/TÉLUQ's FLEXIBLE, OPEN mandate to the institution itself?

_____

_____

_____

_____

15. How successful was BCOU/TÉLUQ in meeting its FLEXIBLE/OPEN mandate?

_____

_____

_____

_____

16. How successful and important was BCOU's/TÉLUQ's FLEXIBLE/OPEN mandate to students?

_____

_____

_____

_____

17. How do you expect that the FLEXIBLE/OPEN mandate of BCOU/TÉLUQ to be affected by the amalgamation?

_____

_____

_____

_____

Area 4: Cost Structures and Costing Methods

18. How did the costs per full-load equivalent (FLE) students at BCOU/TÉLUQ compare with distance education costs at dual-mode universities in your province?

More expensive		Same	Less expensive	
1	2	3	4	5

19. What are the planned personnel, programming, and administrative costs that are expected to result from the merger of BCOU/TÉLUQ with its new institution?

_____

_____

_____

_____

20. What overall impact do you expect amalgamation of BCOU/TÉLUQ to have on cost per FLE?

More expensive		Same	Less expensive	
1	2	3	4	5

Why?

_____

_____

21. Faculty teaching distance courses at dual-mode institutions are often compensated on an "overload" basis. Do you anticipate this changing with the merger of these two institutions? In what ways?

_____

_____

_____

_____

Area 5: Course Development Models

22. How do you expect the amalgamation to affect the way in which courses are developed?

_____

_____

_____

_____

23. How will this impact the time that it takes to develop and revise distance education courses?

More time		Same		Less time
1	2	3	4	5

24. How will this impact the cost to develop and revise distance education courses?

More expensive		Same	Less expensive	
1	2	3	4	5

25. What impact will the amalgamation have on the quality of the distance education courses previously delivered by the new host institution?

Lower quality		Same	Lower quality	
1	2	3	4	5

26. How do you expect the amalgamation to affect the total number of courses and programs available to distance learners?

Fewer courses		Same	More courses	
1	2	3	4	5

27. Are there any issues that arise owing to different models of ownership and intellectual property within the combined institution?

_____

_____

_____

_____

Area 6: Institutional Culture and Governance

28. How will the amalgamation affect BCOU's/TÉLUQ's pre-amalgamation culture and organizational structures?

_____

_____

_____

_____

29. How will the amalgamation affect the host institution's culture and organizational structures?

_____

_____

_____

_____

30. Will these changes assist or detract from the stated reasons for the amalgamation?

_____

_____

_____

_____

Area 7: Teaching and Research

31. How will the amalgamation affect the relative importance assigned to teaching and research duties for those previously on staff at BCOU/TÉLUQ?

    _____

    _____

    _____

    _____

32. Do you expect curriculum design and academic staff from BCOU/TÉLUQ to become involved in both distance and on-site teaching?

    Yes: _____ No: _____

33. If yes, what effect do you think this will have on programming?

    _____

    _____

    _____

    _____

34. Do you expect curriculum design and academic staff from the host institution to become (more) involved in both distance and on-site teaching?

    Yes: _____ No: _____

35. If yes, what effect do you think this will have?

_____

_____

_____

_____

36. Do you expect an increase in enrolments in distance education courses by students enrolled in campus-based programming at UQ and TRU?

Yes: _____ No: _____

37. How much do you expect the research output of staff related to open learning from BCOU/TÉLUQ to change after the amalgamation?

Less research		Same		More research
1	2	3	4	5

38. How much do you expect the research output of staff related to discipline studies from BCOU/TÉLUQ to change after the amalgamation?

Less research		Same		More research
1	2	3	4	5

Area 8: Students and Student Support

39. How has the addition of considerable numbers of distance students altered the way that student services are offered at the institution?

    _____
    _____
    _____
    _____

40. Has the students' union been involved in discussions related to this merger? If yes, is the union planning to alter its functions to provide more services to students at a distance?

    _____
    _____
    _____
    _____

41. Do you expect enrolments of students studying at a distance to increase, stay the same, or decrease compared to the number previously enrolled at both institutions combined?

    Increase: _____ Stay the same: _____ Decrease: _____

Concluding Statement

Thank you very much for having participated in this interview.
Is there anything else that you would like to add that you see as important to this study of the effects of this amalgamation?

Appendix C:

List of Interviewees

Concerning BCOU

- Colin James, associate vice-president academic, Thompson Rivers University; July 14, 2005 (interviewed by Terry Anderson; follow-up by the author)
- Louis Giguère, former interim provost, BCOU; and, currently, academic director, Arts and Science, TRU-OL; July 14, 2005 (interviewed by Terry Anderson; follow-up by the author)
- David Porter, executive director, BCcampus; July 14, 2005 (interviewed by Terry Anderson and Griff Richards; follow-up by the author)
- Jim Soles, former assistant deputy minister, Post-Secondary Education, Province of British Columbia; OLA Board Chair, 2003–2004; October 21, 2005 (interviewed by the author; follow-up by the author)
- Roger Barnsley, former president, University College of the Cariboo; and, currently, president, Thompson Rivers University; November 1, 2005, by phone (interviewed by the author)
- Bill Harlan, president and chief executive officer (interim), Open Learning Agency; November 15, 2005, by phone (interviewed by the author; follow-up by the author)

Concerning Télé-université

- Anne Marrec, former directrice-générale, Télé-univeristé; April 11, 2005 (interviewed by the author; follow-up by the author)
- Louise Bertrand, directrice-générale, Télé-université; April 15, 2005 (interviewed by the author)

- Jean-Yves Lescop, professor and faculty union president, Télé-université; June 20, 2005 (interviewed by the author)
- Pierre Gagné, professor, Télé-université; June 20, 2005 (interviewed by the author)
- Pierre Lucier, former president, Université du Québec, and former deputy minister of education, Government of Quebec; June 21, 2005 (interviewed by the author)
- Michel Umbriaco, professor, Télé-université; June 21, 2005 (interviewed by the author; follow-up by the author)
- Roch Denis, rector, Université du Québec à Montréal; Sept 19, 2005 (interviewed by the author)

Appendix D:
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