

Online Learning Program Strategic Planning And Execution: Considering Goals, Benefits, Problems And Communities Of Practice

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ABSTRACT

The nation's social agenda for improving education and training has converged with national economic forces (Hornbeck & Salamon, 1991). The emphasis on lifelong learning of the workforce through education, training and development, demands for ever-improving productivity and significant technological advancements have required new tools to deliver education and training at a distance when and where it is needed. With the emergence of online learning, organizations have reaped the rewards of a well-educated and trained workforce. Yet, in surveys, educators reported that strategic planning was not being conducted for online learning programs (Berge & Muilenburg, 2001; McNickle & Cameron, 2003), and what planning that was done was deficient in areas such as policy (U. S. General Accounting Office, 2003) and organizational culture (European Union, 2003). Sawyer (2005) found that the leaders and managers of online learning programs (from the academic community, business and industry, the non-profit sector and government) needed help developing and executing strategic plans for their programs, people and systems. When evaluating whether to move content to (or develop content for) an e-Learning program, deciding to purchase tools and/or content, internally designing a new distributed learning system, or beginning to plan for the future, Sawyer (2005) found that the state of the research at that time left the decision maker(s) to make critical choices based on their skill (and/or desire) to assemble and analyze the necessary information that would lead to relevant considerations being taken into account. One large area where the leaders and managers of online learning programs needed help developing and executing strategic plans for their programs was that they needed a single source that could be located and leveraged to gain an insight into online learning's goals, benefits or problems to use as a decision aid or analysis tool. Until now, a comprehensive list did not exist. Sawyer's 2005 study was designed to present a comprehensive list of online learning's goals, benefits and problems that could be applied as a decision aid/analysis tool to aid in strategic planning. This paper presents some of the key findings from this exploratory study which used the emergent, inductive approach of content analysis to conduct a cross case analysis of 607 research reports published over a two year period to establish the existence and frequency of the dependent variables goals, benefits and problems. This analysis resulted in the identification of 61 goals that have been set for online learning programs, 131 benefits that have been documented, and 371 problems that have been encountered. Conceptual and relational analysis were concurrently applied to identify key concepts and their semantic relationships which resulted in the development of a concept map that, when combined with the content analysis, led to the identification of seven recommended online learning communities, as well as a consolidated planning and decision aid to help decision-makers in their strategic planning effort.

INTRODUCTION

*I*n the knowledge-based economy, an educated and skilled workforce is needed to maintain quality improvement, customer service, and the overall performance of the enterprise. The economic reality is that there is an increasing need to successfully employ knowledge and information; Hall (2004), Kuchinke (1995) and Senge (1990) are among those who have encouraged management to respond by evolving into "Learning Organizations." Education is needed for employees to individually assess cause/effect relationships and use

abstract concepts and theories to explain their experiences. As members of teams, they also leverage their prior learning to understand why events occur through the use of scientific principles, determination of variability, and data analysis (Mukherjee, Lapre, & Wassenhove, 1998). Learning organizations strategically encourage and support learning of all types, at any time that it is needed, and at all levels across the organization (Hall, 2004, Kuchinke, 1995, & Senge, 1990).

Technological advancements have allowed the development of tools to deliver instruction at the point of need and on demand, making online learning an integral part of enterprise-wide education and training programs, job aiding and for performance support (Madni, 2005, Sawyer, 2006). Organizations can choose whether to provide fully online computer-based courses, classes delivered with the support of a live instructor over the Internet, and/or in a blended solution that supports traditional instruction augmented with one or more online components. Corporations, government, non-profit organizations, higher education and the labor sector have embraced online learning, often with a vengeance. However, many executives, managers and/or administrators have not applied a strategic approach (e.g. formal vision statements, written objectives) to launching and managing these programs (Berge & Muilenburg, 2001; McNickle & Cameron, 2003; Sawyer, 2006). Regardless of the manager's title, level of responsibility, type of organization (e.g. corporate, higher education) or the role s/he plays in online learning, decisions are being made that result in large sums being invested in hardware, software, and courseware, as well as daily overhead to support the operation and growth of the OLP.

The need for clearly defined strategic plans for OLPs is becoming ever more important as they are directly supporting education and training delivery to a vast market. Within the United States alone, over \$600 billion is invested in education and training annually, with one provider reporting over 160,000 participating online business training course students (Oblinger, 1999; 2001). In government, the General Accounting Office (2003) estimated that the number of potential online students from the armed forces had already reached over 2,000,000. As a result of this large and expanding market, colleges and universities find themselves competing for the adult student, corporate universities have become part of the foundation of many of the country's best firms for both education and training, and companies supplying hardware systems, applications and services have been created.

For the most part, online learning as we know it today developed over the last couple of decades in organizations that traditionally delivered education/training services, with the notable exception of the for-profit, accredited online universities. Many of these e-Learning programs evolved slowly over time, gaining size and complexity as new courses, increasing numbers of learners and new uses presented themselves. The evolutionary growth of many of the online programs has its roots in issues such as limited financial resources, inadequate staff course development and delivery technical skills, inadequate staff and training, and the high cost of expanding hardware and software among others (Australian Government, 2003; Bonk, 2002; Southern Region Education Board, 2002; Tennent, & Hyland, 2003). Other factors that may contribute to the lack of strategic planning can include the cost structure and determination of ROI for online learning, which is substantially different from the classroom (Southern Region Education Board, 2002). This makes the use of previously applied education/training delivery metrics difficult. Many front-line managers of online learning programs have been shown to have a vague knowledge about the costs that are involved in OLPs, and often perceive the online learning system-of-systems to be too complex to set measurable goals and objectives for; on the other hand, some university administrators find themselves responsible for developing and delivering courses that were once the sole purview of individual teaching departments, and senior administrators are now trying to get their arms around decentralized programs controlled by individual departments (Bartram, 2000; Berkowitz, 2001; Bernhut, 2001; Mishel, Berstein, & Schmitt, 2001).

As Jeffries (2000) explained, enterprise-wide online learning initiatives require the structure and management of a business enterprise (including a strategic approach to planning, prioritizing and implementation), which is very different from the traditional approaches to delivering classroom-centered training and education services. Initial infrastructure costs alone can be very high, with learning management systems (LMS), for example, requiring tens of thousands of dollars in outlays (Harris, Logan, & Lundy, 2002; Paulsen, 2002). Tracking the costs involved (i.e. recurrent, production, delivery, and fixed) requires investment strategies, calculations of the recovery of them (ROI), economies of scale, and product (course) time to market that look exactly like the strategic decision-making of the corporate boardroom (Jeffries, 2000). Unfortunately, this path can be difficult with, for example, inadequate accepted

accounting measures to help support the strategic plan's Measures of Effectiveness. Often, the most commonly documented return on investment data comes from organizations such as Lucent Technologies and the IRS who save a great deal of money through cost avoidance of travel associated with traditional classroom training courses (Nucleus Research, 2002; Strother, 2002). Cost avoidance can certainly be a major benefit for moving courses online, but it is primarily a benefit to organizations outside of higher education, and for courses that can developed for full web delivery (Sawyer, 2005).

While the online learning program is at the core of the virtual university, by and large these programs (and the administrators and executives that are responsible for them) exist to support the mission of their enterprises (e.g. university distributed education program). As noted earlier, strategic planning at the program/department level has often not been a priority. However, many managers of these dynamic programs find themselves responsible and accountable for leading large, complex systems that require a vast array of transdisciplinary communities to effectively operate; conditions that are suited for a strategic planning approach (Sawyer, 2006).

NEEDED RESEARCH

Vicere (2000) reported on the state of the field of online learning following in-depth interviews with over thirty recognized experts, analysts, providers, and practitioners. He concluded that: "Based on the interviews, only one conclusion is reached. The field is still too new, too much in an embryonic stage, to reach any conclusions" (p. 35). Fisher (2001) stated: "One underlying problem is the lack of rigorous studies of these technologies, their diverse consequences, and the economic choices underlying their most fruitful uses" (p. 1, author emphasis added).

One additional report succinctly stated the intense need for the research project that underlies this paper. It also supported our experience that there is too often a major focus on the benefits of online learning alone. Manchester Metropolitan University's 2001 report stated that:

These undoubted advantages tend to be presented without any discussion of possible disadvantages or problems and under the bandwagon of urging trainers and organizations to join the bandwagon...The dearth of academic literature available on this subject means that a reasoned debate is lacking, particularly in the areas quality of content, problems with the technology, learner support and evaluation.

Our research quickly found one issue with Manchester's statement: there really is no "dearth of academic literature" in the field of online learning. Rather, the research that has been documented is scattered in publications and reports all over the world. To properly approach OLP strategic planning and execution, many, many hours would have to be spent trying to gain an understanding of the potential objectives and problems, and one would not be very likely to assemble an even somewhat comprehensive list. Why? During the research, we found (Sawyer, 2005) that many of the goals, benefits and problems that are encountered in the research reports that support online learning are only documented once or twice out of hundreds of reports. So, pure luck would play a big part in someone who spent a few days or weeks of digging even finding a highly relevant and important (to them) goal, benefit or problem cited.

As the research project was being designed, a decision was made to review the latest research in online learning, look at potential benefits and problems, and then design a study to fill an identified gap between them; a pretty standard approach. The intent was for us to analyze "the list" and to see what was documented about the benefits that had been realized from moving learning online, the problems that had been encountered, and the goals (beyond saving money) that had been cited.

When the research project began, Sawyer (2005) undertook a concentrated search of the vast, multi-disciplinary body of literature in online learning that revealed no single source that a business executive, academic decision-maker, government official, or researcher could go to in order to gain a comprehensive insight into online learning's goals, benefits or problems to use as a decision aid or analysis tool that would allow them to review the goals and benefits that others have documented that might help in objective setting for their program. Likewise, there was no holistic view of OLP problems would help them to analyze documented issues and, with the appropriate supporting bibliography, point to published literature that could be obtained to aid in problem resolution and/or to aid

in the strategic planning effort for risk mitigation. Unfortunately, a consolidated list did not exist. It is not reasonable to expect an executive, manager or administrator to know every potential objective or issue that might impact a strategic planning effort no matter how experienced they may be and, as we have seen, obtaining a list for decision aiding was (until now) not possible. The lack of a consolidated view of the field of online learning left management to make critical choices such as whether to move content to (or develop content for) an online program, deciding to purchase tools and/or content, or internally designing a new distributed learning system, to their skill (and desire) to assemble and analyze the necessary information on their own.

The exploratory research underlying this paper set out to provide some of the answers to questions such as: What goals had been set in the past for enterprise-wide online learning programs? What benefits could be expected and who did they benefit? What potential problems could be anticipated and who had to resolve or mitigate them? For that matter, what management issues should an executive try and avoid or mitigate?

This paper presents executives, administrators and managers of online learning programs, as well as those in online learning's other communities, with an overview of strategic planning for online learning, the communities that need to be considered in planning and execution, and then discusses some of the findings of the underlying research that serve as examples of the goal, benefit and problem variables that need to be thought through in this process.

METHOD

A six month search for original research reports was conducted for the dissertation research, which resulted in 607 research reports in adult online learning that were published over a two year period (2001-2003) being obtained. When the search was complete, an in-depth, manual content analysis (not a literature review) with concurrent concept mapping was conducted. The study followed a long standing, accepted process to designing and executing an exploratory content analysis-based thematic text analysis (Carley, 1997; Miles & Huberman, 1994; Roberts, 1997; Stemler, 2001; Stone, 1997).

To be included in the study, the document had to be a report of research (e.g. not an article discussing another's research) that was published anywhere in the world, as long as it was in English. The focus of the report's research had to include courses of instruction for educating and/or training adults with the use of the Internet. Three dependent variables (goals, benefits, or problems) were the focus of the study and at least one of them had to be included in the report. Clearly identified/obvious literature reviews and variables immediately followed by a source were not included as the author was referencing another's findings or opinions. Further, the citations were often from sources outside of the boundaries due to their date (e.g. 1999) and/or the author was citing an article that was not a research report. In addition, only variables stated as fact were included (i.e. variables identified with words such as possibly, might be, could be were not included). Goals, benefits and problems common to all education and training programs were also not included (e.g. that receiving advanced education is a benefit to the student). However, if there was any doubt when analyzing a report, the decision was always to defer to inclusion.

Manual coding was selected because of the need to search for both explicit and implicit information (Stemler, 2001; Stone, 1997). Variables that are explicitly stated may well be identified by computer programs that are designed for formal content analysis such as Audience Dialog (<http://www.audiencedialogue.org/soft-cont.html>) and Wordstat (<http://www.simstat.com/wordstat.htm>). However, the identification of variables that are expressed implicitly are more difficult for the software to identify as the variable is identified through its context in the discussion. When a variable was identified, they were transcribed onto a self-developed coding form. In using the coding form, words and concepts that identified a dependent variable were coded for existence (that the goal, benefit or problem existed in the study), with one variable recorded per report (i.e. if a problem was discussed multiple times in a study, it was recorded as one instance). The information from the coding forms was then documented in one of two annotated bibliographies (two were created to support statistical analysis of the data for research questions not addressed in this paper). The development of the bibliographies was an added benefit of the study as these are likely the most complete ones that have been developed in online learning research for the period covered. The variables were also entered onto matrices as interval level frequencies. Some reports clearly identified the dependent variables, while the vast majority discussed them in context (i.e. without clear use of the tag "goal," "benefit" or "problem").

The level of generalization applied was to code the words and concepts the same even when they appeared in different forms. Thus, this research utilized both a factual analysis (looking for specific words and phrases) and a conceptual analysis when the author(s) only addressed the dependent variables in context. As with the studies themselves, when there was a doubt, the decision always leaned toward inclusion of the variable.

This analysis resulted in the identification of 61 goals that have been set for online learning programs, 131 benefits that have been documented, and 371 problems that have been encountered. Additionally, a decision was made to display all of the goals, benefits and problems identified in the research report (Sawyer, 2005) in both the bibliographies and in matrices, even though the majority were cited in few reports. One of the key reasons for this decision was that the primary aim of this research was the unqualified identification and publication of online learning's goals, benefits and problems in order to provide a single source decision-making/strategic planning aid for organizational leaders, decision-makers and researchers. Second, we firmly believe that a low number of instances of being cited does not, in and of itself, reflect that the problem (for example) is minor in a specific case. Third, future researchers may identify variables that they believe are far more important than the number of citations identified in the research would indicate, which might well result in a new line of research.

DISCUSSION

Online Learning Program Strategic Planning

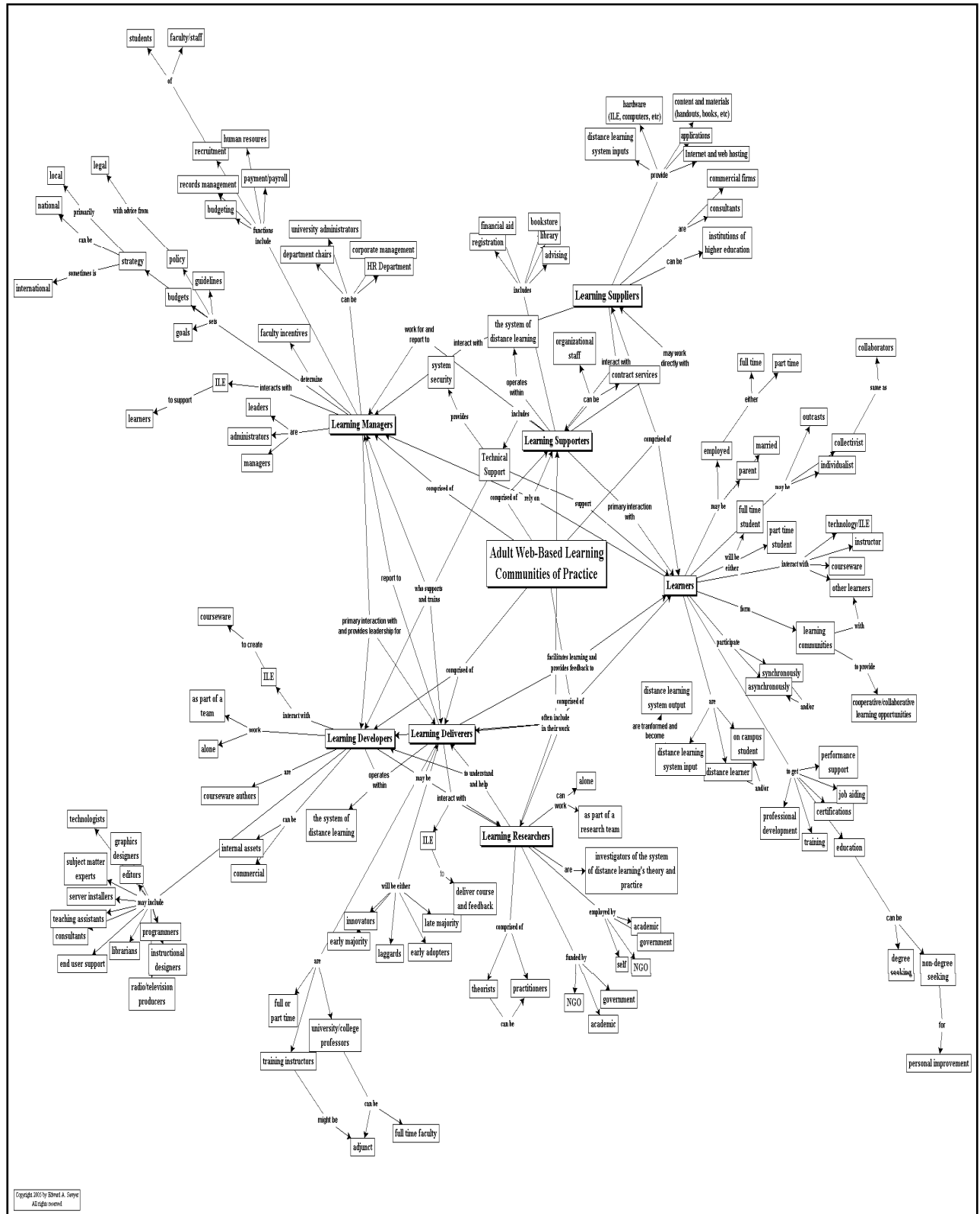
The executive(s) who is, or who will be, responsible for the OLP has traditionally faced a daunting challenge. The OLP is a complex meta-system (or system-of-systems) that requires the teamwork and focus of a transdisciplinary group of highly talented individuals, which is one of the documented problems in online learning (e.g. Cashion & Palmieri, 2002; Gemeinhardt, 2002). The decision to enter into the strategic planning process should be driven by the desire to know the answers to three misleadingly simple questions: Why does my OLP exist? Where do I want my OLP to go? How do we intend to get there?

Communities In Online Learning

At the very start of the strategic planning process, the key stakeholders within the organization have to be identified (Kardasis & Loucopoulos, 2005). While this may appear to be simple on the face of it, the roles and their interrelationships that are required to operate a top quality OLP are surprisingly diverse and complex. So why put forth the effort? While there are a number of reasons, two stand out. First, management needs the key stakeholders (note that it is not necessarily all stakeholders) to help build the strategic plan (Hamel, 1996). Online learning impacts groups across the enterprise, from a plethora of viewpoints and varied experiences. Each perspective is likely to have an impact on the plan development process as a team with multiple backgrounds interacts. Second, while communicating the plan and gaining organizational support for it is part of execution, the communication of it needs to be carefully thought out in advance. The organization's staff, will help or hinder the effort. A world class program that goes unsupported by supervisors will quickly become ineffective. Employees who do not believe that learning online will benefit them can stop the program cold. So, the plan has to consider the constituencies involved and their stakeholder representatives need to carefully consider how support from their organizational components will be gained (Spring, 2006). Of course, as part of the team who built the plan, the stakeholders involved are a ready-made group to help sell it. In addition, when the objectives have been agreed upon, it is the key stakeholders who will most likely formulate the objectives and do the detailed planning for each of the functional units in the organization.

So, who are the communities involved in online learning? During the analysis phase of the dissertation research, concept mapping was employed during the documentation of the goals, benefits and problems. From an enterprise perspective, six clear communities emerged who operate within online learning: the managers, the developers, the deliverers, the supporters, the suppliers, and the learners. A seventh community was identified, but the researchers are not particularly germane to this paper. Figure 1 serves to show how complex OLP communities and their interrelationships (Sawyer, 2005).

Figure 1: OLP communities and their interrelationships



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Like their counterparts in most fields, the learning managers plan, control, direct and monitor online learning programs. They create online learning program strategy, set policy, guidelines, budgets and provide leadership to the others operating within the system. Direct supervisors are essential to success. The managers fill roles such as university administrators, department chairs, corporate executives and managers, and Human Resource Department executives.

Online learning, of course, would be impossible without those who develop the courses, content and media. The community of developers are very diverse community. While the content can be developed by those who teach the courses (especially in higher education), the research found that there is an increasing need for a multi-disciplinary team to develop online course content. This team can include such specialists as media developers, course-specific subject matter experts, computer programmers, information technology personnel, instructional designers, and many others to bring course content online. In fact, one of the top issues for this community is that it is becoming impossible for one or two developers to bring a top quality course to life because no one person can possess all of the skills required (Cashion & Palmieri, 2002; Gemeinhardt, 2002).

The front lines of student learning and satisfaction are those who deliver the education and training courses. The deliverer can be technology alone (e.g. intelligent tutors), as well as a human (online and/or in support of the classroom). One decision that needs to be made, especially in higher education, is whether the adjunct teaching staff is to be represented in the early planning stages. Once, faculty administrators in higher education would not have given the presence of adjuncts on the strategic planning team any consideration due to their small numbers and limited role in campus life. However, it is often the case today that a college teaching staff can include adjuncts at rates that exceed 40% of total teaching faculty (Bradley, 2001). If this is the case, then management needs to make a conscious decision to include, or exclude, them. Each organization is different, and each decision is a separate one. But, remember that these deliverers will be needed to support plan execution.

The online learning community of supporters is also a very diverse group, and they are a linchpin to the online learning experience because they are on the front lines of student and instructor satisfaction. The supporters include advisors/counselors, librarians, the IT Department and technical support. The supporters are often part of the organization's staff, though their services can be outsourced to contractors (online library services for example).

The suppliers bridge online learning's internal system and the external environment, bringing the hardware, software, web services and (sometimes) content that makes the program operate. The suppliers can also be supporters when they provide contracted services such as bookstores, libraries, technical support, developers and consultants. The suppliers are also, at times, the employees of institutions of higher education who design and develop tailored online courses for other organizations. In many communities, the suppliers would not even be considered in the strategic plan. However, the OLP is very, very likely to have contracted services such as technical support. While a contracted service, these personnel directly participate as a part of the enterprise.

The community of learners is the central focus of the entire strategic planning effort. They have to embrace online learning and enjoy participating. The learners in the new economy are not those of the past where they received education/training services after high school and/or at initial employment and then moved on with life. The literature is very clear that lifelong learning now requires those who succeed in the new economy to remain in constant contact with available opportunities, and to stay on top of program/course quality and the results that others have experienced in a program or class. The learner comes to online classes to complete education and training programs for personal and job performance improvement, to obtain college degrees at every level, to obtain (or maintain) professional certifications, and/or for performance support and job aiding. The adult learner in the online environment is most often employed, a parent, and largely participates in their program of study part time.

Strategic Planning For Online Learning

Online learning has many constituencies who have complex relationships, as well as an array of technology that is required to make it all work. The strategic planning process for the OLP is not substantially different from the planning process of any complicated enterprise-wide endeavor, though the aforementioned shortcomings in hard

information have traditionally made it a daunting challenge. There are many excellent books on strategic planning (e.g. Dess, Lumpkin & Taylor, 2005), so our purpose here is to provide an overview of the three key parts that are at the heart of the process (i.e. the mission, vision and objectives), including some practical examples of the types of information that need to be given consideration. It should be noted that a recognized OLP issue is the lack of strategic planning (Sawyer, 2005), but it is never too late to begin. Even programs that have been running for months or years can benefit from a well documented strategic plan and its supporting evaluation metrics.

We need to be clear here to begin the process on the right foot. Mission and vision statements and all of the other planning work will create “shelf documents” if the intention is anything other than ultimately focusing on execution and evaluation. That isn’t occasional monitoring, quarterly reporting or the like. It is day to day involvement in taking the OLP where the vision states that the program will go, and being ready to change course when required (Dess, Lumpkin & Taylor, 2005). We believe that this was one of the key problems in the strategic planning craze of the late 1980s. Many large, complex, and detailed plans were created (sometimes in volumes), but there was no follow-through. Strategic planning evolved from the military, and there even obscure plans for mutually assured destruction were reviewed (and often war gamed) to ensure that they remained current and viable. A living program requires even more attention and monitoring; it is almost a certainty that adjustments will have to be made over time (Melnyk, Calantone, Luft, & Stewart, 2005).

The bottom line of this process is to put the OLP on a path that leads toward the OLP, and the organization’s, vision of the future in such a way that where the program is, where it is going, and what progress is being made can be explained to any organizational executive. With that said, ask questions such as: What is the program going/supposed to accomplish? Where, ultimately, does the organization want to go with the program? What are the reasons for moving education and training online? What benefits are sought? While these initially look like relatively simple questions, the planning team may have considerable difficulty articulating the answers.

Strategic Planning Process

As noted previously, one of the first steps in the strategic planning process is to form a manageable team of key stakeholders from across the enterprise that will formulate the mission and vision statements for the OLP; management participation is a must, and the higher the better. If executive/senior management does not have 100% support behind the final plan, time is simply being wasted. Given that each organization is a little different, additional communities to consider include in-house developers, deliverers and the support community (both administrative and technical). What makes a “key” stakeholder? Simply put, based on our experience, it is an individual who is responsible and accountable for one or more important processes within the OLP—who can make decisions to adjust, alter, or outright reform the process. There is no point to having a room full of people creating a top notch plan who have no authority to implement it.

The Mission

The end result in strategic planning is what counts and the OLP strategic planning team should select the path to complete the planning that best suits their needs (there are no absolute rules). We feel that once the process begins, the mission statement is the best place to start. Why? Because the mission statement clearly states the purpose of the OLP (why it exists) and the contribution it will make to the enterprise. It will be broad, far reaching, and should not require frequent updates (Rangan, 2004). One advantage here is that since most online learning programs are in support positions, if the organization has a mission statement it is possible to adapt it for the OLP. After all, the mission has to be in line with the organization’s mission. However, it is not essential to have one from the firm and OLP strategic planning can be done even if the organization itself does not have a strategic plan. The important part here is that the mission statement must clearly articulate why the OLP exists and that it support the organization. Be forewarned, when the team sits down and begins, writing a clear, concise (a paragraph is about right) mission statement can be difficult to put on paper (Rangan, 2004). One final note. It is possible that the OLP has a previously developed mission statement. If so, we recommend writing a new one in any event and then comparing it to the previous version. If there are significant changes, investigating why they are different may well provide interesting insights for downstream activities.

The Vision

With the mission statement in hand, it is time to focus on what may be the hardest part of the planning process, the vision statement and the strategic objectives. These key elements will serve as the blueprint for the organization related to the way ahead for achieving mission success (Shaw, 2005). Like the mission statement, the vision statement is also relatively brief. Compared to where the online learning program is today, the vision “simply” states where it will be at some point (3, 5 or even 7 years) in the future. It is the vision statement that will guide the strategic plan, and it is where the identification and selection of goals and objectives begins. Writing some of the goals and objectives may well be a part of the vision statement writing process. As the vision statement takes shape, goals and objectives that support it will evolve. But, not all of them. Programs that have already been developed may be underperforming, or they may even need to be scaled back; the vision statement can help provide a foundation to assess its current state and future direction.

The Objectives

With the vision statement in hand, clearly articulated, realistic and measurable goals and objectives need to be set by the strategic planning team. It is important for the OLP strategic planning team to address questions like: Will the program’s deployment move rapidly, or will an incremental implementation be necessary? What are the priorities that will drive online course development and deployment? Will the courses be self-developed, their development be outsourced, purchased off the shelf, or a combination of these? What hardware investments must be made? What training would be required and who will provide it? In short, a gap analysis will be necessary at some point, either to help focus the objectives, or to help identify areas where the vision may be too aggressive. Of course, the goals and objectives will be influenced by factors such as the demands and priorities of the organization and by available resources (e.g. funding, available staff). For those who must defend their budgets, the effort to clearly articulate measurable objectives in order to reach the vision can help. When the budget discussions start and decisions tend toward inadequate financial resources, the OLP management team can point to specific objectives and ask which are to be eliminated (Bayerlein, 2005; Dess, Lumpkin & Taylor, 2005).

Anyway, it is here where the foundational research of this paper can support the strategic planning effort for the OLP. In order to set proper objectives, one really has to ask what the possibilities are. The strategic planning team needs the benefit of a detailed list of potential goals and benefits so that the objectives that they set to support the vision are selected by a decision, not missed by an oversight. For example, Sawyer (2005) identified 61 goals and 131 benefits of online learning that span all of the communities. While some goals do overlap onto benefits (e.g. increased student access to learning), they are far fewer than one might expect. Therefore, in online learning we are dealing with as many as 192 potential objectives. Obviously, the OLP strategic planning team won’t set that many. But, whether a particular objective is appropriate and desired for the situation at hand should be a conscious decision that is based on a comprehensive evaluation of the possibilities.

Once the preliminary objectives for executing the vision statement have been set, Measures of Effectiveness (MOEs) need to be set so that the organization can monitor progress, determine the course of implementation, and then make corrections as necessary along the way. A key management implementation issue found in the research related to inadequate quantifiable MOEs of program and course outcomes. There is often a trend toward measuring what is easy to capture, yet measuring program success on easily obtained data such as the number of courses developed or the number of learners enrolled may make interesting, “feel good” pie charts, but they will not reflect the program’s contribution to the enterprise. Having many, many courses available may lull management into a false sense of accomplishment unless there is hard data such as participation rates in those courses (i.e. many available, few used). Likewise, a key problem in online learning has been (and remains) high learner turnover rates (attrition). Enrollments are informative and can help with course utilization analysis and the like, but successful course completion rates are more telling. Given the goals and objectives, metrics need to be identified that will clearly show if they are being attained.

Why Move Education And Training Online?

The heart of the enterprise’s online learning strategic plan is the objectives that are set for the program. In the research reported in this paper, sixty-one discrete goals and 131 benefits were identified; this is roughly 192 potential objectives. The ten most cited potential objectives in the 601 reports that were analyzed are presented in table one.

Being among the most cited does not necessarily reflect the importance of an objective for the enterprise as each organization is different. Rather, it is important for each OLP management team to carefully assess the possibilities and to set goals that are important to them and their organization. For example, while increasing income/revenues/profits in order to overcome declining public funding and to reach new markets may be very important to higher education and some large organizations, it is not likely to be a goal for a government agency at all. Likewise, while a college professor should carefully consider and plan for the feelings of social isolation that their students may encounter, the developer of a short compliance training course will not give it a second thought. Importance is a completely organizational view based on their context.

Table 1: Ten most cited potential objectives

<ul style="list-style-type: none">- Provide/improve access to education and training programs that would otherwise be unavailable to the learner due to geography, inadequate time, and overloaded courses- Increase income/revenues/profits- Maintain (keep up) or improve the institution's competitive position- Meet the growing demand of students/staff for education and training services- Improve institutional performance (productivity and cost effectiveness)- Provide convenient, flexible education and training at anytime, anywhere, and on the student's own schedule- Permit students to avoid having to travel to class (increase satisfaction, participation, study and family time, avoid parking issues and need for day care which lowers costs. As well as lowering organizational travel expenses)- Allow students to meet/balance work and family obligations while going to school/training- Let students work at their own pace (self-paced) (those who know most of the course material can progress rapidly, while slower students can take their time and not be rushed)- Permit instant, easy to use, relatively free access to digital resources, current information, and reference and supplementary materials 24x7 through hyperlinks and other web resources

At this point, the OLP management team has a draft mission and vision statement with clear, measurable objectives that have been developed, as well as a clear set of metrics that will help the management team to guide the program and monitor progress. As well, careful consideration of the potential issues that might be encountered should be considered (discussed next). At this point, one should also remember that the business units (e.g. division, groups, teams) are the ones who have to execute the plan. The members of the strategic planning team should take a reasonable amount of time (largely driven by how big the OLP is) to carry these back to their people, let them review them and provide comments. They may well see sticking points that hadn’t been thought of, while also providing them with a sense of ownership.

Potential Issues

When the process to this point has been completed, it is time for the OLP team to go to work, develop project plans and begin the execution and monitoring of the OLP’s performance. As with most complex programs, there are a myriad (371) of possible problems that may be encountered. The ten most cited problems in the 607 research reports that were analyzed are presented in table two.

Table 2: Ten most cited potential problems

<ul style="list-style-type: none">- Social support systems missing or inadequate. Students feel isolated and don't like or perform well with lack of face-to-face interaction. It is the case that some students require substantially more social support than others.- Inadequate learner computer technical skills can cause them to be overwhelmed and loose focus on the content. This was the most surprising finding of the research and it often had a major impact on the deliverer.- Learning styles of classroom and online students are statistically different; some prefer/do better with peer/teacher classroom contact. Note that this issue is not the same as the first as this one has its focus on the student's learning style, not their need for socialization.- Online courses increase faculty workload, taking as much as 30-50% more teaching time than the classroom due to email, feedback, and grading papers (an issue for live instructors whether fully online or supporting a classroom course).- Asynchronous communication delays feedback (e.g. questions to instructor/each other, waiting for graded work), lowering team performance and student satisfaction. This is not necessarily only a live instructor issue as CBT courses can also provide an email capability to ask a subject matter expert a question.- Requires high levels of learner self-discipline and organization. The learner has to be self-directed and highly self-motivated to succeed when responsible for their own learning.- Reliability of the technology (e.g. server failures, crashes, software issues, lost uploads). The learners become frustrated and fall behind if it doesn't work properly, which disrupts workflow, lowers satisfaction, and can lead to attrition.- Lack of/inadequate/slow technical and administrative support for the instructors and/or learners. In instructor lead courses, this most often results in deliverers having to stop the training process to help students overcome technical issues.- As anticipated, student attrition was high on the list, though not as high as one might have thought.- Initial course development and delivery costs (e.g. time, money, effort, hardware, software) are high, or are perceived to be high. This particular problem was not only discussed in the context of the initial outlays required, but also in the underestimation by management of the ongoing resources required to maintain a vibrant, up to date program.

Finally, one has to remember that nothing exists in a vacuum. Specific objectives are very likely to have several potential issues, and a comprehensive understanding of the many variables present the decision-maker with an opportunity to think through the interrelationships. Consider: the head of an existing online learning effort may have been getting complaints for some time that the online instructor's hours are too long and the workload much higher than when teaching in the classroom. Concurrently, executive management may be questioning the high attrition rates from their program. After reviewing the problems and thinking about them, s/he notes the high number of students enrolling into these programs with inadequate technical skills. A connection might be made that it is possible that, since there is a wide diversity of students and they do not have an enterprise-wide pre-enrollment skills test for first time online learners, under skilled students are signing-up for a class, and are having difficulty. And, those already overworked teachers are hard pressed to perform their regular class work, let alone teach a student how to send email. Thus, the student drops the course (or fails). Connections like these are important to proper program planning.

CONCLUSION

A lack of strategic planning by executives and managers was the second most cited problem that they have to address. Inadequate strategic planning in a dynamic system such as online learning is likely to result in a complex variety of issues, as well as missed opportunities.

The strategic planning process for online learning requires a firm understanding of why the enterprise wants to move education and training online, and result in a clear roadmap of goals and measurable objectives to be implemented. The planning process permits key stakeholders to intensely focus on where they want to go and how they intend to get there. Requirements and resources can be carefully balanced to prevent many of the issues that can arise in the program's development and deployment.

The field of online learning continues to develop. However, it has matured a great deal and the researchers are providing some good lessons learned in their reports. We know a great deal more about what works and what does not and the potential benefits and issues that may be encountered. The research reported in this paper provides executives and managers from enterprises across the spectrum of business, government, higher education, non-

governmental organizations and labor with a consolidated view of the many variables to be considered in the planning process.

For the first time, online learning decision-makers and those who work in the field in business, government, and academia are presented with a consolidated view of the goals/reasons that organizations have for implementing these programs, the benefits that they realize, and the problems that they encounter.

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