

# **Alternative Staffing Approaches for Scalable Distance Education: The Open Learning Perspective at Thompson Rivers University**

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### **1 BACKGROUND AND CONTEXT**

This paper will describe how within the Open Learning Division of Thompson Rivers University, (TRU-OL) one department (Program Delivery) has employed multiple strategies to achieve a unique staffing model in Open and Distance Education. Program Delivery provides the necessary infrastructure to ensure the students' open and distance experience is rigorous, of high quality and academically sound. The department is the key link between the student, their course, materials and their instructor, referred to as an Open Learning Faculty Member (OLFM). A staff of 21 unionized employees support faculty-student interaction, course implementation, technical operation and exams. The OLFMs also work under a comprehensive Collective Agreement and therefore all positions generally fall within the specified parameters of the agreement. There have been occasional exceptions in the past for a Personal Services Contract, for an individual who was not a BC resident and was needed to facilitate a highly- specialized course. However, we do endeavor to hire within BC ,under the terms of the agreement.

Ultimately Program Delivery is responsible for a positive student experience and the seamless operations within a complex organization. However, another department within Open Learning - the Curriculum Services department, centrally designs courses. This department is comprised of instructional designers, writers, editors, and LMS specialists. Course developers with subject matter expertise are hired on individual contracts. Each school or faculty brings a proposal forward to the Program Marketing Advisory Committee, who then make a recommendation to the leadership committee with respect to viability, cost, and feasibility for development. This process is time-consuming and often takes over two years to emerge as a final product.

Currently we have over 230 Open Learning Faculty Members (OLFM's) located across the province of British Columbia. These individuals may be employed full-time by other post-secondary institutions, industry or community organizations. In order to be hired however, they must meet rigorous university standards and possess the requisite credentials required for their specific position. The Open Learning Faculty Members are responsible for the facilitation of independent study, continuous entry courses in print and web-based methods of delivery. There are also OLFMs who are responsible for paced cohorts of learners, in courses delivered asynchronously. We have well over 25,000 enrollments per year, 500 courses, certificate, diploma, undergraduate and graduate credentials. Our enrollments also generate approximately 1200 exams to be organized, monitored and invigilated every month.

Four years ago, continued increases in enrollments, triggered a number of questions within the department. What was important? How would priorities be established? How would we know if we veered off course? How could we ensure our faculty had both the capacity and confidence to deal with both advances in technology and emerging pedagogical theory for distance learning? How would staff continue to cope with this continued growth in times of budgetary constraint? More recently however, our enrollment growth has become very modest.

These questions and others, prompted the creation of a departmental "vision and mission" to set the overarching philosophy, foundation, principles and direction for the foreseeable future. After several working sessions, with the team, the department reached a consensus and Program Delivery created a vision and mission to guide and represent the critical elements in their work, moving forward. The vision was modified in 2014-2015, and will continue on a path of iterative development to accommodate the ever -changing operational needs of the organization.

Through times of growth, turmoil, competing priorities and additional competitors, these statements have provided an anchored frame of reference and assisted as a decision-making tool within the department.

## 1.1 Vision of Program Delivery

We will use our collective knowledge and experience to support the teaching and learning process by providing timely, accessible, flexible and high quality service to students, Open Learning Faculty Members and other TRU departments, through the innovative use of technologies and the implementation of best practices in distance learning.

## 1.2 Mission of Program Delivery

We are a team of professionals working collaboratively to facilitate positive experiences for TRU-OL students, Open Learning Faculty Members and the TRU Community.

## 2 BUILDING CONFIDENCE THROUGH FACULTY DEVELOPMENT

Our faculty development program has its roots in several well-known theorists. For example, it incorporates Knowles principles of Andragogy, (Merriam, Cafferalla, & Baumgartner, 2007) the multifaceted concepts involved in self directed learning and lastly incorporates three concepts posited by Mezirow's transformational learning theory: experience, critical reflection and individual development (Meyer, 2013). Using the foundations previously mentioned, our goal was to support and transform an individual's perspectives, confidence, capacity and frames of reference.

In order to reach our goals, the program has seven major components supporting our highly dispersed workforce. Fig.1, highlights the components of the program, designed to maximize and support the OLFM's development in an online environment.



Fig. 1. Components of TRU-OL's Faculty Development Program

## 2.1 Senior OLFM's

A group of six Senior OLFMs are available to support, coach, mentor and provide pedagogical and technical advice to new OLFMs. Selected for a term of three years, these exemplars are assigned a protégée to mentor.

For the first six months, they support and ensure the new recruit has completed all the steps in the Orientation process, understands the technical platform, is comfortable with the administrative processes, and knowledgeable with respect to the terms and expectations of the Collective Agreement. The Senior OLFM then maintains the relationship with their protégée as needed, or requested, on an ongoing basis.

The Senior OLFMs work across disciplines as their expertise is in the pedagogical and technical area, rather than the particular discipline. Contact is initiated by the Senior OLFM and maintained via email, Skype, or other mutually agreed upon methods of contact. New OLFM's have provided very positive feedback with respect to the assistance and support they receive from their Senior OLFM.

The Senior OLFMs have been selected for their ability and knowledge to provide support and advice on the operational processes and procedures of the organization. Well-supported faculty are the best advocates to address their colleagues inquiries and support their foray into the online learning environment. (Sibley and Whitaker, 2015).

## **2.2 Orientation**

Upon commencement of employment the OLFM is provided with links to an orientation website ([elearning.trubox.ca](http://elearning.trubox.ca)) and a checklist of activities to complete within the first six months of their employment. The website provides a comprehensive overview of responsibilities, expectations, and potential professional development. The orientation checklist is completed at the recruit's own pace, and provides a guide in order to become familiar with the relevant policies, responsibilities, contact information, technology, course materials and related information.

Each OLFM also receives LMS training before accessing his/her particular course. This training is personalized by the E-Learning facilitator depending upon the previous experience of the OLFM in an online environment. The E-Learning Facilitator will also ensure new faculty can navigate the portal in order to enter and change marks, as the entering of an assignment mark, triggers assignment pay. All faculty are encouraged to take the Faculty Development courses, however they are not compensated for their time. If they have not taught online before they are required to successfully complete these courses within their first year of employment. Should they not meet this commitment, it would be noted in their file and addressed during the evaluation phase.

Upon successful completion of their first six months, a probationary review is held among, the Director, Senior OLFM and the new OLFM via a teleconference. The purpose is to answer any lingering questions on behalf of the OLFM, review and assess initial performance to date while providing an opportunity to build a relationship among the new and established members of the team.

## **2.3 Coaching and Performance Reviews**

Under the terms and conditions of the Collective Agreement, the Director must evaluate an OLFM every two years. The evaluation session provides an opportunity for the OLFM and the Director to candidly discuss student feedback and related performance issues, along with ideas and corrective strategies for improvement.

As the majority of the course offerings follow the continuous entry model, student feedback is accumulated and sent out to the OLFMs twice a year. Students are contacted after 3 weeks in their course to ensure they have everything they need to progress successfully. As students near the end of their course another email is sent to remind them how to apply for their examination and to let them know that they can apply for an extension should it be required. Finally, an electronic course evaluation survey is sent to the student upon course completion. Response rates to this survey are currently 47%, and we are exploring methods to increase the return rate of student feedback. Positive and negative comments from the survey, student kudos or complaints, provide the administration an indication of OLFM engagement. This feedback provides a valuable tool to measure student satisfaction with the OLFM and provide discussion points and coaching opportunities, during the OLFM's performance review.

Additionally, the OLFM is expected to create a series of goals and objectives to be accomplished over the next evaluation period. These goals may be related to his/her pedagogical interests or discipline area. When the follow-up occurs, the OLFM is expected to outline how the goals were achieved and if not, provide a fulsome explanation as to what barriers they encountered. They also provide an overview of any scholarly activity they may undertaken as part of their continuing professional development.

Since arriving at Thompson Rivers University the Director has ensured that these evaluations are carried out directly face-to-face. This process although time consuming, has anecdotally become an important touchstone in the process of developing virtual relationships with a distributed team. The face-to-face evaluations are labor and resource intensive, however they create an interpersonal link in the virtual and often lonely environment of the online educator. OLFMs provide notes of appreciation and thanks to the Director for the investment, dedication and time to conduct these meetings. Both parties agree, these meetings provide an opportunity for coaching, relationship building, gathering data from the field, and a forum in which to tackle unsatisfactory performance issues. Additionally, this process serves to act as a pillar of quality assurance for online students. These meetings also provide a venue for the OLFM to gain further information and clarity with respect to procedures and policies that the OLFM may have found challenging. This feedback from the OLFM is yet another opportunity for the department to possibly improve and fine-tune our administrative processes.

## **2.4 Community of Practice**

To provide a forum for sharing of knowledge, posing of questions, updates to technologies, additional resources, as well as opportunities, related policies and procedures, we have developed a comprehensive online resource for the Open Learning Faculty Members. Our goal was to establish a vibrant learning community where, OLFM's could network, chat, build relationships and gain information as required. Despite repeated efforts to promote this resource, the uptake and use has been less than anticipated.

## **2.5 Video Newsletter**

As another strategy to keep touch with the OLFMs, the Director produces a video newsletter. The "Director's Chair", is an informal and upbeat video tool, with a casual and conversational tone. Usually five to seven minutes in length, the Director covers a variety of different topics, related to administration, strategic planning, program development, professional development and other topics that would be of interest to the target audience. This tool also provides the virtual OLFM with an insight and overview as to campus initiatives and can be useful to virtually introduce the OLFMs to campus administration. Feedback on this initiative has been very positive, and we are reminded when we may miss an issue.

## **2.6 Professional Development**

### ***2.6.1 Discipline Focused***

Under the terms and conditions of the Collective Agreement, OLFM's are entitled to a substantial professional development allowance. This initiative is a joint undertaking between the employer and the union. A committee, comprised of representatives of both groups, vets applications to ensure relevancy to their work at Thompson Rivers University. Individuals are encouraged to use these funds to stay current in their field of practice, attend conferences, do research and share their findings with colleagues. The uptake on this funding has increased over the years as the information on the program has been more widely distributed and discussed at the face-to-face evaluation meetings. OLFM's have been encouraged to use the funding as a way of reflecting and improving both their discipline related knowledge and online pedagogical skills.

### ***2.6.2 Faculty Focused***

Open Learning has developed a robust Professional Development Program to support the instructional development of our Open Learning Faculty Members. This program includes: monthly webinars focusing on new technologies, policies, tips and tricks; an annual face-to-face conference; three continuous entry asynchronous online courses based on Anderson's Community of Inquiry (COI) model of social presence, teaching presence and cognitive presence (Vaughan, Cleveland-Innes, Garrison, 2013).

We have titled our courses "Think, Engage and Teach." Think is focused on on the COI concept of cognitive presence, and focuses on strategies to encourage students to take a deeper approach to learning. "Engage" explores methods to develop a strong social presence in the virtual online classroom and encourages students

to do the same. Lastly the third course “Teach” combines the design, facilitation and direction of cognitive and social presence to achieve learning outcomes.

These three courses are mandatory for all new OLFMs and must be successfully completed within the first year of an OLFM's employment with Open Learning. OLFMs attend the other events as their schedules dictate. Any sessions are recorded, so that those unable to attend still have the opportunity to obtain the knowledge within their busy and demanding schedules.

## **2.7 E-Learning Facilitator**

The critical component of the Professional Development Program is the work of the E-Learning Facilitator. This individual has the primary responsibility of working with the Director to design and implement all components of the faculty development program previously mentioned. This role is a critical component of an OLFM's orientation and onboarding to Program Delivery. Additionally this role encompasses problem solving tricky technical issues faced by departmental staff and OLFM's, marking the Faculty Development course assignments, providing one-on-one trouble shooting and training to OLFM's in need. As pointed out by Sibley and Whitaker, “They should do everything in their power to be seen as a respected, highly skilled, and supportive resource, giving faculty the confidence to ask novice questions or take appropriate risks...” (2015, p.4)

## **3 SUSTAINING VIABILITY AND COST EFFECIENCIES**

### **3.1 Pay for Performance**

The payment model for OLFMs at Open Learning is somewhat unique in the world of post-secondary education. The majority of the Open Learning Faculty Members are employed elsewhere, therefore their work at TRU-OL is a part-time undertaking. There is however, a very small percentage of the OLFMs who make this work their primary source of income and these tend to be those who have been with the organization for many years. We currently have approximately 15% who have been with the organization for over 20 years.

OLFM compensation is primarily based on a “piece work” model, whereby one is compensated by the number of students and how much work they complete. For example, an OLFM receives a payment for each student registration in his/her course. They also receive a “Marked Assignment Fee (MAF)” for each course dependent on method of delivery. The MAF is divided among the total number of assignments for the course and the amount of work required. For example, in the independent continuous entry method of delivery the OLFM is there to assist students with their queries and questions, and mark assignments.

In the online, paced-cohort method of delivery the OLFM is expected to lead students through the course, provide additional relevant course content and be an active member in online discussions. The MAF also varies according to the number of course credits. Therefore, the standard MAF for each delivery method is distributed equally over the number of assignments within the course and the number of course credits.

The OLFM receives a portion of the MAF payment when a mark is entered for an assignment. It is important to note that the OLFM is only compensated when an assignment mark is entered – if the student fails to submit an assignment there is no compensation. OLFMs are generally paid a standard rate for marking exams, depending on the type of exam and specific course. OLFM's also receive payments for participating in different activities such as committee meetings and interviews. This compensation model provides an incentive for the OLFMs to keep students engaged in the course. We also only compensate the OLFM for the students who actually submit their work and therefore the compensation tally raises or falls with the number of students who register and the number of assignments completed. This model is therefore both scalable and flexible. The current payment system is entirely automated, however as it is integrated with the student management system, it consistently needs IT development and support.

The compensation for each OLFM is highly variable. An OLFM could be responsible for students in an online paced course, as well as a continuous entry course. They are paid bi-weekly and compensation varies from 16,000 \$ Canadian to well over 150,000\$ Canadian per year. This variance reflects the numbers of students in the course, the seniority of the OLFM, the type of course (paced or continuous entry), the particular subject

area, and the marked assignment fee, An OLFM will also generate additional compensation from participation on committees, attendance at meetings, the annual conference, and work as a Senior OLFM.

### **3.2 Innovation and the OLFM**

Implementing a compensation model of pay for performance, has also acted as a catalyst and brought out the entrepreneurial drive in many OLFMs as they strive to improve retention and engagement of their students.

When given the opportunity to improve student retention and engagement, the President of the Open Learning Faculty Member's Union had an idea for a piece of software that would provide students with encouragement and comments as they progressed through the course. With IT support and development the OLFM is now able to send a supportive or investigative customized email at the push of a button out to all students within a certain category i.e. they can welcome all students who have registered within the last seven days, they can congratulate everyone who has received a mark of over 70% in the last week, they can nudge those students who have not had a mark entered within the last 30 days, the possibilities are endless as this system evolves and becomes increasingly sophisticated.

This becomes a win-win situation for all. The OLFM is increasingly satisfied with higher retention and engagement from the student, which ultimately affects the bottom line of his/her compensation. The student is satisfied with the support and creativity used by the OLFM to make the learning experience productive and meaningful.

## **4 GOVERNANCE AND STAKEHOLDER RELATIONS**

Open Learning works within the frameworks of complex Collective Agreements affecting staff and Open Learning Faculty Members. Current contracts with the unions are renegotiated every five years. The provincial government mandates guidelines for these negotiations. However, the foundational concepts and operational guidelines of the Thompson Rivers University Open Learning Faculty Association (TRUOLFA) Collective Agreement have been in place for close to 40 years. Modifications have been integrated into the agreement, as time, governments and circumstances have changed.

The operational philosophy between the employer and TRUOLFA is one of collaboration and consultation. Based on this operating model, a number of formal committees have been created. Overall the responsibility of these groups are to advise the "administration" on topics of interest to the specific stakeholder group and where problems or concerns are identified, the parties attempt to reach a resolution.<sup>1</sup>

These committees include representatives of the student body, union executive, administration and senior Open Learning Faculty Members. Informally, the Director and the management team are available to meet, either virtually or in person with any staff, student or faculty who has a need or concern. Membership on these committees has representation from administration, the stakeholder group and the union, as specified in the TRUOLFA Collective Agreement.<sup>2</sup>

The four primary operational committees are the:

- Student Advisory Committee;
- Labor Management Committee;
- Selection Advisory Committee; and
- Open Learning Advisory Committee.

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<sup>1</sup> Collective Agreement between the Thompson Rivers University and the Thompson Rivers University Open Learning Faculty Association, p. 64

<sup>2</sup> Ibid p.65

## **5 LESSONS LEARNED**

### **5.1 Technically**

An infrastructure that can accommodate growth and flexibility in changing technical requirements is paramount. Questions to consider include:

- What sorts of technology will students be demanding?
- What new developments are in the offing from your service providers?
- What advances in technology will provide increased efficiencies for your staff?
- Are the registration processes logical, visible and easy to navigate?
- What trends are there in social media that may need to be accommodated?
- How much flexibility is being built into the systems?
- Will an out of the box solution work or will it require customization?
- How will the timelines be managed?
- What kind of pedagogical preparation will be required for the faculty?
- What kinds of training will the staff need?

This list of questions is only intended to provide a basis for a more fulsome exploration of issues that need to be considered.

### **5.2 Administratively**

As administrators, it becomes a balancing act to monitor the growing workload of staff members. This requires constant vigilance to ensure teams remain engaged and fulfilled on a personal and professional level. Ensuring staff and OLFMs are properly trained, supported and continually motivated is a huge focus as an administrator. No amount of information appears to be excessive and the more venues one can utilize to disburse the information, the better. Integrating new staff into an established culture and accommodating special needs can require patience and tolerance from all parties. Being actively present to listen to your staff, to help them identify not only the issues but also potential solutions is the responsibility of the senior leaders in the organization.

From a staffing perspective, having all staff involved in a jointly developed mission and vision helps to inform the team, build a collaborative work environment, be aware of each other's roles and responsibilities and provide a solid foundation for empowered decision making. A weekly stand up meeting with staff can work to address process and communication issues. Supporting staff to achieve their personal goals as well as enabling and delegating responsibility within the scope of their position, has worked to create a stable team environment with one of the lowest turnover rates in the organization.

The position of an E-Learning Facilitator has also been a critical factor in our success. Hiring an individual with a pedagogical and technical background brought creditability to his relationship with the OLFMs and departmental staff. His enthusiasm for the use of technology coupled with his teaching credentials enables him to discuss and understand the OLFM's particular needs and objectives. The E-Learning Facilitator is then able to research and recommend the appropriate technology to support the desired outcome. This position has also enabled our department to create a robust faculty development program, the video newsletter, yearly conference, webinars, and on-going support for our OLFMs in the area of online learning.

### **5.3 Resources**

Utilizing Senior OLFMs with a great deal of experience as mentors and coaches is an invaluable and cost effective strategy to assist with the integration of new OLFMs. Providing new faculty with a subject matter or technical contact, who they can build a relationship with in their early days, provides a level of comfort to the new recruit and works to everyone's benefit.

Our unique payment method for OLFMs means that we operate on a results oriented model. We pay per student and per assignment rather than per class. If the OLFM does not encourage and engage the student, then the retention is low and as a consequence their compensation would be affected. If a particular course or

program becomes popular it is easily scalable as increased tuition revenues allow for increased compensation costs. If enrolments diminish, then our costs also diminish.

Paying for results also has created an opportunity for the OLFMs to become more creative and entrepreneurial as they look for opportunities to support and encourage students, which consequently can increase their bottom line.

## **5.4 Student engagement**

Open Learning's mandate supports increasing access and providing learners with an academic opportunity through its policy of few pre-requisites, in conjunction with programs that maximize learners' previous knowledge or skills (e.g. Prior Learning Assessment and Recognition, Credit Transfers). This philosophy of openness however, requires very clear explanations and communication with the student especially where grades, appeals and academic integrity issues are concerned. Students can harbor the misconception that great effort equals a high mark. Dispelling this myth can be challenging.

Additionally ensuring online capability and support for both students and faculty can assist in bringing the human touch to the online or virtual world. Frequent communication to the faculty from administration and from the faculty to the students can clarify misconceptions, deal with initial fears and provide a personal connection in the online world.

## **6 TO CONCLUDE – WHAT'S NEXT?**

Open Learning foresees continued, but slower growth in the numbers of learners, the programs and the OLFMs. What then do we foresee to maximize the use of technology and resources in these times of budget constraints, while continuing to provide outstanding service to OLFMs and students, and keeping focused on the opportunities for operational improvements and efficiencies?

As leaders in these increasingly challenging times of higher education, what might we do to ensure the viability of our programs, services and well-trained faculty? Possibilities for TRU include:

- Perhaps providing an incentive for the OLFMs to actively participate in the "trubox" site to facilitate the exchange of ideas and information;
- Moving towards online exams invigilated in real time in the students home;
- Creating a database whereby the OLFM could access student evaluations in real-time;
- Increasing automation of the payroll system, with greater responsibility on the OLFM to input data for approval;
- Engaging all staff to periodically review the department's mission and vision to ensure it is consistent within the larger and ever changing organizational context;
- Maintaining a motivated and empowered team who are fulfilled with their roles and responsibilities; and
- Recognizing that not all innovation may be successful, but not being afraid to working out of the box.

To conclude the following quote succinctly summarizes our approaches in these challenging, exciting and unpredictable times.

***"Do not follow where the path may lead. Go instead where there is no path and leave a trail".***  
***Ralph Waldo Emerson***



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