eLearning in Ontario:
Responding to the Winds of Change

by

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Abstract

This thesis examines elearning strategy and policy development in the Ontario university sector during a four-year period of heightened activity and public discourse. In particular the articulation of the goals and purposes of elearning across the upper levels of the administrative hierarchy are analysed, with attention to tensions between groups of policy actors and stakeholders active in this domain. The research was guided by the overarching question: How have symbolic models for strategic success in the shifting elearning policiyscape been conceptualized and integrated across the Ontario university sector? First, historical background on the emergence of elearning in the federal and provincial context is presented, followed by analysis of the various discipline-based approaches to understanding changes to system level and institutional practice. The conceptual framework for the study is informed by this range of epistemological lenses already evident in the scholarly discourse exploring both the potential and the challenges related to elearning initiatives.

In this doctoral thesis, ideal-types are used as a heuristic technique, in combination with the concept of the policiyscape as a model for understanding the significance of global influencers. A vertical case-study methodology involving document analysis and interview components compares paradigmatic perspectives and sheds light on the policy negotiations among key stakeholders within the province. The findings suggest there have been significant tensions between participants in the policy development process, with the most important points of tension arising as a result of government promotion of new models aimed
at economic and productivity gains borrowed from the broader policyscape. Institutions have resisted such models as they respond to their internal stakeholder concerns and navigate contextual constraints. The findings suggest that further investigation of three aspects of the policy process would be beneficial: the role of community feedback, the potential for alternative incentive structures, and further consideration of the significance of path dependencies.
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Definition of Terms

**eLearning** - Web-based learning outside of the physical classroom having at least 80% of instruction online

**Online Learning** - Web-based course and program elements that may be taken without any requirement of attendance at the physical location of the institution

**Hybrid Learning** - Course and program formats that combine online environments with campus-based strategies.

**Policyscape** - Constellation of policy ideas and conceptual frameworks that are legitimized through institutional emitters that promote particular models and influence political actors.
Acronyms

BC - British Columbia
CANARIE - Canadian Advanced Network and Research for Industry and Education
CCL - Canadian Council on Learning
CIDER - Canadian Initiative for Distance Education Research
CLOE - Cooperative Learning Object Exchange
COHERE - Collaboration for Online Higher Education and E-Research
COU - Council of Ontario Universities
GATS - General Agreement in Trade of Services
MYAA - Multi-Year Accountability Agreement
OCUFA - Ontario Confederation of University Faculty Associations
OER - Open Educational Resource
OOI - Ontario Online Institute
OOLC - Ontario Online Learning Consortium
OUA - Open University Australia
OUCeL - Ontario University Council on eLearning
OUSA - Ontario Undergraduate Student Alliance
PSE - Post Secondary Education
R&D - Research and development
RFP - Request for Proposals
ROI - Return on investment
SMA - Strategic Mandate Agreement
WTO - World Trade Organization
Table of Contents

Abstract .......................................................................................................................... ii
Acknowledgements ......................................................................................................... iv

Definition of Terms ......................................................................................................... v

Acronyms ......................................................................................................................... vi

Table of Contents ............................................................................................................ vii

List of Figures .................................................................................................................. ix

List of Tables ................................................................................................................... x

CHAPTER 1 - INTRODUCTION ..................................................................................... 1
  Overview of the Problem ............................................................................................... 1
  Research Questions ....................................................................................................... 4
  Significance of the Study .............................................................................................. 5
  Structure of the Thesis ................................................................................................ 8

CHAPTER 2 - LITERATURE REVIEW ......................................................................... 12
  Introduction and Context .............................................................................................. 12
  Terminology .................................................................................................................... 17
  Globalization: Catalyst for Change .............................................................................. 18
  Marketization: New Business Opportunities ............................................................. 20
  Scalability: Opportunities and Issues ........................................................................ 22
  Innovation: Technology as a Lever for Change .......................................................... 24
  Social Context: Turbulent Times and Changing Attitudes of Academic Leaders ....... 26
  Growth in Online Learning ......................................................................................... 28
  Chapter Summary ....................................................................................................... 29

CHAPTER 3 - THEORETICAL CONSIDERATIONS ..................................................... 31
  Policy Process .............................................................................................................. 31
  Ideal Types ..................................................................................................................... 34
  Polieyscape ..................................................................................................................... 39
  Summary of Literature Review .................................................................................... 41

CHAPTER 4 - RESEARCH DESIGN ........................................................................... 42
  eLearning Parameters ................................................................................................. 44
  Data Collection Methods ............................................................................................. 44
  Methodology Components .......................................................................................... 45
  Interpretation of Entire Analysis ............................................................................... 52
  Methodological Limitations and Ethical Considerations ........................................... 53
  Chapter Summary ....................................................................................................... 55

CHAPTER 5 - HISTORICAL OVERVIEW AND EVENTS IN ONTARIO ................. 57
  Historical Overview ..................................................................................................... 57
  Recent Chronology ....................................................................................................... 65
  Additional Contextual Factors ..................................................................................... 70

CHAPTER 6 - FINDINGS PART 1: NEGOTIATIONS AT THE TOP OF THE POLICY IMPLEMENTATION STAIRCASE .................................................. 75
  Technological: Borrowing from Industrial and Business Models ............................. 76
  Market-based: Economic and Access Goals .............................................................. 80
  Content-based: Instructor Driven ............................................................................... 85
  Pedagogical: Effective Design ..................................................................................... 87
Summary of Document Analysis Using Ideal-Typical Framework......................... 90
Interpretation and Negotiation: Tensions in the Policy Community .................... 91
Summary of Phase 1 Analysis................................................................. 101

CHAPTER 7 - FINDINGS PART 2: THE INSTITUTIONAL VIEW .................... 106
By the Numbers: Growing Beyond the Capacity Baseline............................ 106
Strategic Mandate Agreements (SMAs) .................................................. 113
Analysis of Institutionally Initiated Strategic Planning Activities.................. 117

CHAPTER 8 - FINDINGS PART 3: PERSPECTIVES FROM THE FRONT LINE 126
Backstage Messages from University Leadership ....................................... 127
External Influences.............................................................................. 130
Other Key Issues and Paradigmatic Tensions.......................................... 133
Dynamic and Impact of New Policy Initiatives....................................... 136
Summary of Phase 2 Analysis............................................................... 143

CHAPTER 9 - DISCUSSION ................................................................... 146
Summary of Analysis............................................................................ 147
Key Dimensions Influencing the Process of Elearning Policy Incubation ....... 153
Implications of Global Policyscape Framing.......................................... 160
A Recipe for Policy-Fail or Constructive Ambiguity?................................. 171
Conclusion........................................................................................... 177

REFERENCES....................................................................................... 184
Appendix A - References for Public Macro- and Meso-Level Documents..... 205
Appendix B - Interview Guide for Phase 1b............................................ 209
Appendix C - References for MYAA Document Sources.......................... 211
Appendix D - References for SMA Document Sources.............................. 214
Appendix E - References for Institutional Strategy Documents ................. 217
Appendix F - Interview Guide for Phase 2b............................................ 219
Appendix G - Consent Form Examples.................................................... 221
Appendix H - Sample Extract from an MYAA Report............................... 221
Appendix I - University Sector Shared Online Course Projects - 2013 - 2015... 221
List of Tables

Table 1. Alignment of Phase 1 methodology phases with sub-questions #1 and # 2.......................... 50
Table 2. Alignment of of Phase 2 methodology phases with sub-questions #3 and # 4 ....................... 51
Table 3. Examples of early Canadian advisory reports on elearning............................................. 60
Table 4. Categorization of symbolic models and strategies according to Duus' four paradigmatic ideal typologies .................................................................................................................. 98
Table 5. Ontario university online course enrolment increases based on MYAA reports for graduate and undergraduate programs ................................................................. 110
Table 6. Aggregate percentage annual growth in Ontario university online course enrolments based on MYAA data .................................................................................................................. 111
Table 7. Ontario university increases in online courses offering based on MYAA reports .............. 112
Table 8. Aggregate percentage annual growth in Ontario university online courses based on MYAA data .................................................................................................................. 113
Table 9. Examples of Ontario university institutional goals presented in 2012 SMA proposals...... 116
Table 10. Distribution of thematic elements from Ontario university internal strategy documents across Duus' four paradigmatic models........................................................................ 119
Table 11. Excerpts from Ontario university internal strategy documents related to market opportunities and budgetary considerations ........................................................................................................ 120
Table 12. Excerpts from Ontario university internal strategy documents related to pedagogical innovation .................................................................................................................. 121
Table 13. Excerpts from Ontario university internal strategy documents related to faculty support and buy-in.................................................................................................................. 123
Table 14. Interview excerpts regarding university leadership responses to new provincial elearning initiative .................................................................................................................. 129
Table 15. Interview excerpts regarding university leadership responses to the MOOC model of online course delivery .................................................................................................. 132
Table 16. Summary of challenges to institutional alignment with provincial elearning initiative as reported by Phase 2 interviewees ........................................................................... 134
Table 17. Student population to online course offering ratio for 2012 with institutions ordered smallest to largest ................................................................. 141
List of Figures

Figure 1. Four ideal-type elearning paradigms. ................................................................. 35

Figure 2. Visual model of research design ........................................................................ 44

Figure 3. Timeline of major elearning policy and strategy events in Ontario .................. 71

Figure 4. Distribution of sub-themes identified in Phase 1 document analysis ................. 91

Figure 6. Mapping showing progressive convergence of symbolic models and themes ........ 104

Figure 7. Ontario university online course enrolment growth ........................................ 109

Figure 8. Points of alignment and tension at the institutional level of implementation ........ 123

Figure 9. Comparison of concerns of Phase 2 interviewees with other thematic priorities. 123

Figure 10. Online course to student population ratio ...................................................... 141

Figure 11. Visualization of the process of elearning strategy and policy development ......... 179
CHAPTER 1
INTRODUCTION

Overview of the Problem

Online learning, also known as “elearning,” first surfaced as an explicit strategic target for the Ontario government in the throne speech of 2010 (Government of Ontario). Following the premier’s unexpected announcement of plans for a new “Ontario Online Institute,” an extended provincial consultation process provided an initial forum for discussion. More fuel for the fire came in 2012 with the emergence of the Massive Open Online Course (MOOC) phenomena. Media coverage highlighting the disruptive aspects of elearning within the higher education landscape reflected a range of viewpoints, both positive and negative, focused on economic implications as well as pedagogy (Contact North, 2013b). As the Contact North report on media activity during the period of January 2010 to August 2013 noted, this “confluence of issues in education, politics and economics, and technology meant that online learning became increasingly part of the news” (2013b, para. 6). While aggregate quantitative data on the growth of online learning in Ontario were not available at the time, reports from the Canada and the USA from this same period (Allen & Seaman, 2013; Belshaw, 2012; Canadian Virtual University [CVU], 2012) asserted that acceptance and adoption were on the rise. By all appearances, the winds of change were blowing. This debut of new provincial policy initiatives, along with broad media attention and evidence of a steady expansion in online offerings in other jurisdictions, were important drivers influencing elearning strategy development in the period immediately following the premier’s sudden announcement. The higher education community expressed a range of reactions to these external pressures. Senior leaders of institutions of higher education, as well as policy actors
within the halls of provincial government and intermediary organizations, grappled with new questions being raised (Contact North, 2013b).

**Lack of models for analysis across disciplinary strands.** During such periods of turbulence, many leaders and academics seek substantive evidence and turn to the available research for strategic models and data to support decision-making. An initial literature review exploring the potential lenses for analysis identified a number of strands of scholarly activity related to the topic of elearning strategy, though seldom focused at the higher education *system* level as the unit of implementation. Several white papers and reports have advocated for the advancement of online learning activity within the federal and provincial context (Contact North, 2012; CVU, 2011), but have left a gap in terms of systematic research mapping policy processes that inform strategic action. The individual strands of research each tend to present a particular disciplinary perspective or paradigm as the basis for consideration of localized online learning strategy adoption. An inherent challenge in reviewing the literature on elearning strategy is the fact that elearning is not a field of education or research in and of itself, but rather represents a thematic filter for selecting works from across existing, well-established disciplinary strands.

**Need for an integrative approach.** This study seeks to provide a valuable integrative model that can transcend the research silos currently prevalent in the literature. It will contribute to the approaches available to educational researchers by revisiting Weber's theoretical construct of the "ideal-type" as a measuring stick for comparison of symbolic models that may influence strategy and policy process (Weber, 1949). This study also explores the idea of the "policyscape" as a framework for interpretation of the events and elearning trends within a global landscape (Stromquist, 2013). This framework informs understanding of
the borrowing that occurs between jurisdictions and the isomorphic tendencies among institutions. The two approaches were integrated within the design of this study with the aim of mapping paradigmatic positions regarding the goals and purposes of elearning. Insights into the perspectives of diverse stakeholders and consideration of a range of epistemological paradigms can support the processes of government, provincial organizing bodies, and post-secondary institutions in the evolution of their strategy and policy to meet the future needs of higher education within Ontario and beyond.

In **informing strategy development.** The sequence of events in the Ontario university sector provided a unique opportunity for a fruitful case study, as a progression through negotiation and introduction of a new strategic focus and related policy instruments occurred over a very short period of time. This compression foregrounded the issues particular to introduction of an elearning strategy and escalated the dialogue amongst stakeholder groups within the higher education sector. Emergent provincial government directives, in combination with factors external to the Ontario system, increased pressure on administrators and senior academics to interpret the shifting landscape and effectively guide the planning processes (Contact North, 2013e). Government, academic and administrative leaders will all benefit from a more nuanced analysis of the arena of online learning strategy and policy process, in particular exploring tensions between economic and sociological paradigms. Providing decision-makers with a picture of the evolving perceptions of the value of e-learning initiatives, while situating those viewpoints within the Ontario university system context, supports the policy process by ensuring that more informed choices are made. It will be important for our leaders to not only understand the current global context for the field of online education, but also be sensitized to the range of strategic orientations that may factor
into the effective achievement of institutional and system goals.

Research Questions

This study analyzed paradigms for understanding the nature and purpose of elearning strategy initiatives reflected in the responses of stakeholder groups during a period of heightened activity both globally and locally. These stakeholder groups are conceptualized as occupying three tiers in the administrative hierarchy within the sector. Provincial government leadership, including the provincial Premier's office, the Ministry of Training, Colleges and Universities (MTCU), and government policy analysts, occupies the top tier, or macro-level. The next tier, or meso-level, includes professional councils and organizations that represent specific stakeholder groups in the province and act as intermediaries, advocating for the priorities and interests of their members. At the third tier, or institutional level, are the university leaders and administrators responsible for steering institutional response. This study traced the response to the provincial government's online learning initiative across these three levels of the administrative hierarchy.

The research focused on the dynamic and the impact of the rapid emergence of a regional online learning initiative by addressing the following overarching question:

How have symbolic models for strategic success in the shifting elearning policy-scape been conceptualized and integrated across the Ontario university sector?

Additional sub-questions informing the study include the following:

1. How are dominant elearning paradigms reflected within the macro- and meso-level public messaging on strategy and policy?
2. How do those paradigmatic messages compare with viewpoints and responses to
evolving eLearning strategy and policy across intermediary organizations in the sector?  
3. How are Ontario universities navigating provincial messaging on eLearning, global influences, and internal pressures, as reflected in their strategic responses; and  
4. How does the combination of the broader policyscape and the provincial initiative influence the interpretation of the goals and purposes of eLearning across these three steps of the policy staircase?  

A vertical case study was conducted to answer these questions, informed by both document analysis and interviews with individuals involved in developing and operationalizing the eLearning strategy. This analysis of orientations across the three upper tiers of the sectoral hierarchy provides a useful intelligence for political and academic leaders who are responsible for policy and strategy development in Ontario and in other jurisdictions. As noted by Stromquist (2013, p. 223), the broader policy context may suggest prescriptions or symbolic models that are not “spelled out in detail” and thus the possibility arises for “substantial translation” to occur. Given the potential for multiple interpretations of the intention of policy initiatives, understanding the perspective of the “other” is key to successful policy development and operationalization in higher education.

**Significance of the Study**

This study extends the development and application of two theoretical models: the ideal type construct and the conceptual framework of the policyscape. Integration of these two theoretical frameworks through a vertical case study analysis supports effective strategic planning related to future eLearning policy initiatives at both the system level and at the institutional level. This is achieved through exploration of the differences in the conception of the goals of a higher education eLearning strategy as reflected across key stakeholder groups
active in the Ontario university sector. The significance of the study across these dimensions is further detailed below.

Firstly, the study contributes to the theoretical exploration of the intersection of ideal types and policyscape as tools for understanding the socio-political analysis of the policy process. The research builds on Max Weber's well known conception of the ideal type as a framework for comparative analysis (Weber, 1949), in this case adapted for comparison of a range of epistemologically-based paradigms related to the value and purposes of elearning strategy development. It also contributes substantively to our understanding of a more recent stream of research that uses the policyscape as a theoretical perspective to explore the spread of policy ideas, inter-relationships within and across jurisdictional boundaries, and the nature of policy formulation processes within a global cultural economy (Carney, 2008; Stromquist, 2013). While many researchers, including Carney and Stromquist, have noted neo-liberal economic ideologies as an increasingly strong force influencing our higher education policy formulation, this study encompasses mapping of counterforces and alternative paradigms as well.

Secondly, the study contributes to the stream of literature considering the impact of system-wide online learning directives on strategic responses emerging at the institutional level. The observation of patterns of convergence and divergence in the implementation of policy strategy in this uniquely compressed period of policy incubation advances our comprehension of the factors influencing broader transformation within the sector, as seen through the lens of elearning policy process. There are many possible approaches facing those responsible for elearning strategy development, both at the provincial level and at the local level. This study takes a systems perspective that will inform the work of government and
influential leaders as they negotiate value propositions and anticipate the potential responses across the system hierarchy and among various sectoral stakeholder groups.

Lastly, this study contributes to the field of higher education policy by analyzing the disruptive qualities of technology and tracing repercussions within a vertical case study to improve our understanding of both the global and the local implications. Examination of a compressed, dynamic period of strategy formation in the Ontario university sector in response to government elearning initiatives provides an opportunity for deeper understanding of effective policy-making processes. Given the substantial financial investment in ramping up online learning in our province and many other jurisdictions, there is risk that public resources may be wasted if the introduction of new policy and funding instruments are not evidence-informed. In many jurisdictions the goals of elearning initiatives and articulation of potential benefits to stakeholders are being influenced by the rapid global groundswell in online learning in higher education. Growth in elearning initiatives in the corporate sector has also had an impact on attitudes toward the potential uses and benefits. Given these increasing pressures, it is worthwhile to trace the threads of strategy implementation from the government offices down to the level of individual universities in Ontario in order to surface insights into constraints and opportunities facing institutional leaders and reduce the potential for poor policy decisions and unnecessary expense. The vertical case study analysis provides value through a more holistic view of the evolving dynamic, including both sociological and economic considerations, and related assumptions regarding the disruptive nature of the process.

I have had the opportunity to be immersed in the policy process and observe the evolution of the provincial strategy through my work as a senior administrator responsible for
online learning at a large Ontario university. The result is a professional curiosity combined with a scholarly interest in contributing to the body of literature that supports deepening of our insight into the changes occurring in this domain, and increasing our efficiency in responding to a shifting environment. Having experienced the initial cycle of evolution of elearning policy process in a professional role, I am uniquely positioned to identify linkages between existing scholarly literature, theoretical models, and the realities of experience on the front lines. This thesis has provided an important opportunity to thus address theoretical, epistemological and operational dimensions of elearning strategy implementation. Deeper understanding across these three dimensions will benefit those who are responsible for strategy implementation not only in Ontario, but also in many other jurisdictions.

**Structure of the Thesis**

The thesis is structured in nine chapters. Following this introduction, in Chapter 2 a literature review is provided outlining the dominant strands of scholarly literature and other information sources influencing the policy arena. To establish the scholarly context for this investigation, recent research materials are reviewed with attention to divergent paradigmatic approaches to elearning strategy conceptualization, including comparative education, organizational development, policy studies, and business process orientations. Special attention is paid to the pressure on leaders and decision makers given the increased acceptance of elearning strategies and the acceleration of policy development in the province. Surfacing the diversity in the conceptualization of the goals of higher education elearning strategy is foundational to this thesis proposal and the theoretical orientation of the study.

Theoretical elements that underpin the research design are presented in Chapter 3. Relevant models for understanding policy process are described. In order to better understand
significant drivers of elearning strategy development, in particular at the intersection of
economic and sociological orientations, Duus' (2009) four ideal-type paradigm for the
development of elearning strategies is introduced as a frame for analysis. A description of
Argyris and Schon's model of theories of action (1977), and its applicability to this study are
briefly explored. The chapter concludes with foundational ideas that are the basis for the
concept of a policyscape.

In Chapter 4, I outline the research methodology based on a two-phase qualitative
analysis aimed at mapping an evolving landscape and the increasingly complex implications
for those responsible for decisions regarding university policy, funding and program planning.
Both phases have two parts, with each including document analysis and interview components.
Details regarding the participant population and data analysis process are provided, as well as
consideration of the limitations of the study.

In Chapter 5, the stage is set for description of the findings with a review of the events
preceding the period that is the focus of the study. This includes a description of historical
milestones and related policy documents from several Canadian jurisdictions, as well as
literature discussing the influence of federal research initiatives. A detailed chronology of
events during the period of the study and outline of other contextual factors are also presented.

The findings of this thesis are divided into three chapters that describe the process of
interpretation across the steps of the administrative hierarchy, addressing each of the research
sub-questions in sequence. A description of the outcomes of rigorous document analysis
examining the strategic goals and themes evident within the provincial government policy
documentation and sectoral communication related to new elearning initiatives is provided in
Chapter 6. The dominant elearning paradigms reflected within the macro- and meso-level
public messaging on strategy and policy are probed, with a focus on materials published from 2010 to 2015, a period of rapid change in provincial activity accompanied by funding incentives. Interpretation of the tensions between the macro- and meso-levels is explored, taking into consideration factors that have shaped the public discourse on policy with respect to the goals and potential benefits of elearning. This allows for comparison of viewpoints evident in publicly communicated responses to evolving elearning strategy and policy in intermediary organizations within the provincial system.

In Chapter 7, I explore the sectoral reaction to the emergent directives and themes evident in the institutional responses, beginning with a review of quantitative data and proposed strategic mandate goals published in government reports. An analysis of institutional strategic planning documents and internal activities from universities across the province is provided. Attention is given to Ontario universities' navigation of provincial messaging on elearning, awareness of global influences, and response to internal pressures, as reflected in their publicly communicated strategic responses.

In Chapter 8 the findings for the final phase of the data analysis are presented, illuminating the lived experience on the front lines of institutional leadership, as reflected in the observations of senior administrators responsible for operationalizing elearning strategy at Ontario universities. Building on the findings of previous chapters, the addition of participant observations regarding key challenges and institutional motivators allows a comprehensive mapping of the responses to the policy processes at the institutional tier within the sector hierarchy. Findings regarding the influence of the external models on the interpretation and responses at the institutional level of the policy staircase are presented.

I conclude the study in Chapter 9 with an integrated summary and discussion of the
findings outlined in the preceding three chapters. The implications of those findings are explored in more detail, with particular attention to the influence of the broader policymaking landscape. Informed by existing research literature, other dimensions such as path dependency and the impact of unique characteristics of this period of accelerated policy incubation are discussed. The chapter concludes with a detailed consideration of emergent issues, policy implications, and recommendations for further research to support effective eLearning policy implementation in the future. Through close observation of the compressed dynamics of convergence and resistance within the sector, this study will thus provide new insights and deepen our understanding of the implications for the current rapid transformation in higher education.
CHAPTER 2
LITERATURE REVIEW

In this literature review, I first explore contextual aspects of elearning research, highlighting the significance of key factors from the broader higher education landscape and their impact in this domain. This is followed by a definition of terminology and exploration of dominant themes evident in the research and other scholarly sources. Finally, current literature related to growth and adoption of elearning strategies is reviewed.

Introduction and Context

It has been suggested that the emergence of technology-enabled learning began a revolution in higher education that is comparable with the introduction of the printing press in its significance for education (Bates, 2001; Chaloux & Miller, 2013; Hedberg, 2006; Laurillard, 2006). Harasim (2012) described the introduction of the internet as a major technosociological shift in which "advanced network technology interacts with powerful new models of education and training that offer the potential to produce knowledge-based economies and the democratization of knowledge production" (p. 17). While various forms of distance education for learners unable to physically attend a post secondary institution had been available for more than 100 years (Garrison & Cleveland-Innes, 2010), the first fully online post secondary courses were developed and offered in the mid-1980s (Harasim, 2012). In this era, pre-dating the introduction of the graphical World Wide Web as we know it today, the focus was on interactive and collaborative knowledge building using text-based tools (Harasim, 2006). Subsequently, as the availability of user-friendly internet access grew exponentially in the 90s, the potential for low cost broad geographic access was increasingly attractive to those facing access challenges (Guri-Rosenblit, 2009). Guri-Rosenblit observed that the unique role of distance education providers was no longer clear and distinct from that
of other types of post secondary institutions as the boundaries became blurred and new views on the benefits of offering online courses and programs emerged (p. 6). Beyond an opportunity for increased access, the rapid development of new web-based models and their impact on the models for learning began to change paradigms, value propositions and strategies across the higher education sector.

**Massification.** Like the printing press, online learning is an instrument of change, but the rate of adoption and purposes of use have varied widely. The opportunity for increased access through elearning, as noted above, aligns with the phenomenon of massification of higher education that began in the latter half of the last century (Altbach, Resiberg & Rumbley, 2009). Van der Wende (2002) succinctly described this shift as an external factor driving elearning:

> The emergence of the knowledge economy, in which economic productivity and growth is increasingly dependent on the development and application of new knowledge, creates a growing demand for a highly educated and flexible work force, leading to a further massification of higher education and to an increasing need for lifelong learning opportunities. (p. 2)

Online learning was seen to have the potential to meet the demands for education by a wider and wider audience, both traditional-aged university students and other types of learners seeking career-related or other educational opportunities (Clothey, Austin-Li, & Weidman, 2012; Daniel, Kanwar, & Uvalić-Trumbić, 2009; Moloney & Oakley, 2010). Some scholars suggest we are now beyond a situation of massification and on to one of universal access, putting even more pressure on government leaders and policymakers to provide alternatives (Jongbloed & Vossensteyn, 2015; Trow, 2000).
Financial constraints. As a result of this demand for access, increasingly both political leaders and universities have been asked to extend programs and supports, frequently in the face of declining financial resources. Online learning may be seen as a possible solution as public funding declines (Bowen, 2012; Carey & Trick, 2013; Lautzenheiser, 2013), in a landscape complicated by the increasing prevalence of private providers (Bokor, 2012; Jongbloed & Vossensteyn, 2015). The demand for access and widespread cutting of budgets often occur in tandem, the result being that policymakers are seeking alternatives that provide increased efficiency, or optimize use of available resources. Some of the more recent research literature and white papers have foregrounded evidence of the potential for technology-enabled, flexible access to public education and improvement in the efficiency and productivity of the institutions, while at the same time maintaining quality (Bowen, 2012; Carey & Kelly, 2013; European Commission & Directorate-General for Education and Culture, 2014; Lautzenheiser, 2013; Mehaffy, 2012; Selingo, Carey, Pennington, Fishman, & Palmer, 2013). Several of these sources highlighted examples of American state systems that have had success in implementing such strategies, including Arizona, California, Florida and Texas.

Market pressures. Other nuances of change in higher education that are reflected in the discussion of the potential benefits of system-level elearning initiatives have been linked to what is often described as a neo-liberal approach to educational policy. For example market competition, commodification and internationalization all become significant factors if governments and institutions position education as a product that can be marketed globally or privatized (Conole, 2007; Contact North, 2016; Haigh, 2014; Kosmützky & Putty, 2016). Headlines have featured claims such as "Online Learning Industry Poised for $107 Billion In 2015" (McCue, 2014, p. 1) and "Huge Growth in E-learning in Asia, Market Report Says"
Universities have also considered the re-packaging of programs to accommodate a mobile student population and to allow flexibility in how students can use multiple sources as a credential pathway that suits their financial means and professional goals (Contact North, 2016; Guruz, 2011; Mehaffy, 2012; Melton, Miller, & Kumar, 2014). The traditionally stable university, which historically required the student to adjust to institutional requirements, has increasingly been challenged to adapt to external market pressures.

**Discussion in popular media and scholarly literature.** The changing landscape of higher education has also been a subject of much argument in the popular media. As will be discussed later in this chapter, leaders have been expected to respond to external opportunities and threats, and also plan for a future that is difficult to predict. A 2016 article in Quebec business newspaper, Les Affaires, featured the headline "Universites: Evoluer ou disparaitre" [Universities: evolve or disappear]. The article quoted Stephen Downes, a well-known Canadian researcher in the field of elearning, who asserts that we will shortly assist in the break-up of the education market, which will favour the emergence of a wide variety of suppliers and programs targeting specialized competencies. Audrey Watters (2016) published a list of corporate educational technology ‘deals’ in 2015 that together came to a total potentially as high as two billion dollars (Watters, 2015; Bates, 2016). The challenge facing institutional leaders is well encapsulated in the MIT Technology Review article (Carr, 2012, p. 1) entitled "The Crisis in Education." It opens with the question: "Online versions of college courses are attracting hundreds of thousands of students, millions of dollars in funding, and accolades from university administrators. Is this a fad, or is higher education about to get the overhaul it needs?" The range of opinions expressed in media and other popular sources regarding the
potential of online learning have varied widely, providing little guidance to policymakers and leaders.

Scholarly literature also reflects a variety of conceptions of the value and purpose of elearning. Lenses for exploration range from the more technical, focused on the effectiveness of system architecture, networks and learning platforms, through to consideration of broader sociological or philosophical conceptions of the nature of education at the other end of the continuum. During my review of the research literature conducted in preparation of the proposal for this thesis, publications discussing technical and pedagogical design were found to be plentiful, but analyses of organizational factors and socio-cultural factors at the macro-level of system policy analysis were quite sparse. However, in the intervening months, elearning generally, and MOOCs specifically, acted as a lightning rod for political discussion at all organizational levels to the degree that the political dimension may be considered a “core characteristic” of advanced study in this area (Conole & Oliver, 2006, p. 57). The topics of "Globalization," "Innovation and Change," and "Costs and Benefits" were found to be present, but at a very low frequency in an extensive bibliographic study of distance education research literature undertaken by Zawacki-Richter and Anderson in 2014 (p. 18). In another meta-analysis of research literature related to distance education, Bozkurt et al. (2015) identified "Globalization of education and cross-cultural aspects" and "Distance teaching systems and institutions" as two of five main macro level domains of research (p. 335). However, the results of their study also show a "strong imbalance between research areas and high over-representation of the micro level perspective" (p. 342). Where research literature on system level strategy is available, it is primarily grounded in two discipline areas, business analysis and organizational sociology. Several key themes are recurrent: globalization, marketization,
scalability and innovation. Following a short discussion of terminology and definitions, each of these key themes will be explored in turn.

**Terminology**

A persistent issue in the analysis of reports and literature in this domain is the varied interpretation of the meaning of the word “elearning.” As many researchers and policy strategists have discovered, there are no uniformly agreed upon definitions of the terminology used to describe the various forms of technology-enabled learning. During the 1980s the terms “elearning” and “online learning” first came into use (Harasim, 2000). Scholars and policymakers have differed in views on the exact meaning of these terms as they have evolved across time and among different geographic regions. Detailed analysis of usage of terms such as elearning, distance learning and online learning confirms that these terms are often used interchangeably, yet not consistently among researchers (Moore, Dickson & Galyen, 2011). Selected examples from Canadian government and research organization reports include the following:

- **Canadian Initiative for Distance Education Research (CIDER):** The term "elearning" is used broadly to describe information technology-based distance education or use of these strategies in on-campus contexts (Buell & Anderson, 2006, p. 3).

- **Canadian Council on Learning (CCL):** In a 2009 report the authors noted that “elearning can include online courses, hybrid courses or technology enhanced learning” (CCL, 2009, p. 30).

- **Ontario Ministry of Training, Colleges and Universities (MTCU):** The category of “elearning” describes web-based learning outside of the physical classroom in the annual Multi-Year Accountability Agreement (MYAA) submitted by each university.
It should be noted that these definitions include a range of formats that combine online environments with campus-based strategies, known as hybrid or blended models. For the purposes of this study, the MTCU definition of “elearning” as web-based learning outside of the physical classroom will be used. The term "online learning" is used synonymously with reference to program elements that may be taken without any requirement of attendance at the physical location of the institution.

While consideration of the value of specific design elements and various online course formats are the subject of extensive scholarly literature, analysis of evidence regarding pedagogical design is beyond the scope of this study. To set the stage for a systems view of elearning policy and strategy development, this literature review instead focuses on recurrent themes evident across a number of discipline areas. While general educational research literature discussing broad topics such as globalization and marketization is plentiful, this review has been narrowed to include only literature that makes specific reference to technology-enabled online learning in relation to the selected themes.

**Globalization: Catalyst for Change**

As noted by Conole (2007), the evolution of higher education over the past 30 years reflects a changing perspective on the purpose of education. She observed that these changes, including elearning initiatives and a shifting focus in higher education values and purpose, are part of a wider context of a globalized, networked society. Policy for technology integration was seen to have a potential role at the frontier of this transition early on in the seminal work of Kearns (2002). A shift in emphasis from knowledge acquisition to higher order skills supporting an information society was linked to research on elearning by Garrett, Matkin &
Kumar (2005) and Guri-Rosenblit (2006). This paradigm shift has been noted by scholars across the globe, including the UK (Conole, 2007), Australia (Nunan, 2005), China (Spencer-Oatey, 2007), and France (Schneckenberg, 2009). Discussion of the influence of globalization has been revisited by others in recent years (Brindley, 2011; Fevolden & Tømte, 2015; Gunawardena, 2014; Spring, 2014). Gunawardena noted that the demand for higher education is being driven primarily by the potential for economic benefit and rising benefits in terms of employment (p. 75). A secondary factor she identified is socio-political in nature, with universities under increased pressure to provide access to groups that have not traditionally attended university. Online distance learning that can transcend jurisdictional borders is seen as a potential solution to increased demand.

The impact of globalization, enabled by new communication technologies, is also an underpinning of the theoretical concept of the policyscape (Stromquist, 2013, p. 222). The global policyscape context may serve as a tool for understanding the relationship of both broad isomorphism and its contrasting complement, regional differentiation. Stromquist noted both the diffusion of policy and the contextualized local response as important factors in the analysis of the transformation and the preservation occurring in higher education.

While there are many advocates, there are also scholars who have taken a negative view on its impact. Although less common, there are a number of researchers who have adopted a critical stance and challenged the dominant narrative that frames elearning as an enabler of access and preparation for participation in the global knowledge economy. In the Canadian context, David Noble is often noted as one of the earliest researchers to raise questions regarding the role of technology in his seminal book entitled *Digital diploma mills: The automation of higher education* (1998). Clegg, Hudson and Steels (2003) and Brown (2008)
have discussed the possible negative outcomes of the commodification of learning and
challenged the idea of the inevitability of technologically based change. Anderson, Brown,
Murray, Simpson and Mentis (2006) noted the following potential outcome:

The impact of liberalisation and greater international competition could be massive. For
example, there is a danger that the variety and viability of local content for domestic
students could be placed in jeopardy as cheap labour and economies of scale from large
international providers put downward pressure on fees and academic salaries. (p. 50)

In her discussion of drivers, policy, practice and impact in elearning, Conole (2007)
particularly emphasizes the impact of elearning in relation to the tensions between
individualization, local culture and global hegemony (p. 2). These authors contested ideas that
had been promoted and broadly accepted by the public, suggesting that the agenda of
policymakers in power is not in the best interests of the institutions, instructors or learners. As
noted in the previous section, such views are in some cases reflected in media and opinion
pieces. However, based on this literature review and a preliminary analysis of policy white
papers, it can be seen that there are fewer scholarly works taking a negative perspective on the
topic.

**Marketization: New Business Opportunities**

In the first decade of this century, broadening access to education through online
learning strategy implementation was one of the dominant themes explored within research and
policy communities. More recently, business analysis has been a lens that is often applied to
this domain. An illustrative example situated in the Ontario context is Huisman and Pringle's
study entitled "Understanding Universities in Ontario, Canada: An Industry Analysis Using
Porter’s Five Forces Framework" (2012). The five forces explored include: a) threat of new
entrants; b) supplier power; c) buyer power; d) threat of substitutes; and e) industry rivalry. This systematic micro-economic analysis based on the five forces model provided advice to policymakers, the sector, and individual institutions with regard to the need to consider more seriously the impact of technology and globalization on competitive positioning in the market.

A number of models for calculating the institutional return on investment (ROI) are evident in the literature. For example the Canadian Council on Learning (CCL) report on the "State of E-Learning in Canada" (2009) included a discussion of cost effectiveness, emphasizing that intangible costs must be factored into calculations of costs, and that ROI should be evaluated relative to institutional business drivers, goals, and organizational development. Bates and Sangra (2011) have done extensive investigation of models for cost analysis of online learning. A related report affirming the possibility of reducing costs through introduction of online learning in post-secondary learning was published by Contact North (2013c), and has been echoed in subsequent publications.

An especially volatile topic in policy research relates to open marketization of higher education, including online learning, in order to either reduce costs or increase revenue. On the global stage, there has been controversy over the proposed General Agreement in Trade of Services (GATS) that was put forward by the World Trade Organization (WTO) in 1995. This is a set of multilateral rules covering international trade in services, including online education services, aimed at resolving barriers to global markets such as tax, fee regulation or accreditation issues (WTO, 2016). Arguments for marketization have included improvement of student choice, increase of program quality and variety, or decrease of learner costs through competition (Brown, 2008; Hogan, 2012). On the other hand, it may be argued that GATS will facilitate liberalization of the market in a manner that compromises important elements of
quality assurance and permits private and foreign providers to achieve monopolies (Knight, 2006; Knight 2010). The discussion as to whether or not deregulation and privatization will be beneficial has been particularly contentious (Bruce, 2009; Jung, 2009; Jung & Latchem, 2007; Nunan, 2005).

**Scalability: Opportunities and Issues**

A third theme that is increasingly prevalent within research and strategy documents is exploration of scalability as a potential avenue to cost savings through improved efficiency. Large-scale adoption of online learning, as described by Carey and Trick (2013), Lautzenheiser (2013), and Sener (2010), included both economic and social considerations. Sener noted a number of concerns related to organizational and cultural issues such as faculty acceptance, organizational structures, and tenure and promotion policies. He suggested that the gradual acceptance through steady growth and consequent familiarity will remove these barriers. Morris (2008) explained economies of scale in online learning as savings that accrue through fixed costs of an institution being spread over more units (courses) delivered and longer production (course delivery) runs. Curran (2008) noted that a number of early studies from Europe, including those at the Open University, showed economies of scale when they reached into the hundreds and even thousands of students taking a course provided through more industrial methods of course production. Collaboration between institutions is another proposed avenue to achieving economies of scale (Curran 2008; Carey & Trick, 2013).

Other nuances suggested by Morris (2008) include increasing capacity with repetition of process as practitioners improve their skills, which is a form of economy of scale. He also differentiated between internal efficiencies to improve productivity and external expansion to widen the audience. Both internal and external models are embraced by Carey and Trick
(2013) who linked online learning pedagogy, restructuring of online program delivery, collaboration on common course frameworks, and other scalable processes to optimization of available institutional resources. Morris (2008) is notably sceptical on the risk of production and support of fully scaled “mega-courses” that he described as the “global campus” model (p. 336), prescient of the emergence of the MOOC phenomena in 2012. Early discussion of MOOCs raised two fundamental controversies that have been reflected in the literature. The first related to the possible compromising of program quality in exchange for broad access (Carey & Trick, 2013; Conole, 2013; Daniel, 2012). The second related to the risk in “unbundling” learning from the traditional university delivery, assessment and accreditation structures as large scale MOOCs potentially provide more flexible and low-cost education pathways (Anderson, 2013; Melton, Miller, & Kumar, 2014; Yuan & Powell, 2014).

Whether online or face-to-face, a recurrent argument is that, unlike other sectors of the economy, higher education is unable to increase productivity simply by automating its functions, given the nature of the teaching process. This is has been framed in research literature as “the cost disease,” a term coined by William Baumol (1993). He argued that in labour-intensive industries such as the performing arts and education, there is less opportunity than in other sectors to increase productivity by scaling, since "human touch is crucial, and [they] are thus resistant to labour productivity growth" (Baumol, 1993, p. 3). While the MOOC phenomena may be seen as evidence to the contrary, many have expressed concern for the demise of the traditional residential university experience, the result being a polarization of viewpoints in MOOC-related literature and media coverage. However, what all observers must concede is that the MOOC phenomenon was a significant catalyst for discussion of the purpose and value of higher education among policymakers and institutional leaders, and is likely to
have a continuing influence in the discourse regarding global online education (Kovanović, Joksimović, Gašević, Siemens, & Hatala, 2015).

**Innovation: Technology as a Lever for Change**

The idea of elearning innovation as a catalyst for improvement of quality has been a recurrent topic of research and a common theme in Canadian policy and strategic planning (Borokhovski, 2011). An extensive quantitative analysis undertaken by Abrami et al. (2008) collected Canadian policy and report documents promoting a range of purported benefits of elearning, including “better academic achievement,” “higher motivation for and satisfaction with the learning process,” and “increases in communication and collaboration among all participants in the educational process” (p. 7). Much of the research on technology-related innovation explores the potential for new digital strategies to enhance the production and sharing of knowledge. Schneckenberg (2009) cited a number of earlier studies and asserted that elearning development not only supports availability of digital curriculum resources and flexibility of learning modes, but also can help “to raise quality standards and to create a culture of excellence in teaching and learning” (p. 412). Massy and Zemsky undertook analysis of barriers to advancement in their provocatively titled paper, “Thwarted innovation: the research says what it says” (2004). This study is as an early counterpoint to the accepted discourse on the benefits of innovation, documenting a culture of resistance and slow transformation among the instructor population.

Schneckenberg (2009) identified several issues as drivers of the need for innovation in higher education, and pointed out the linkage between globalization and technological innovation, along with the related pressure to generate revenue to counterbalance the steady decrease in public funding. The outcome is competition “between each other and at the same
time enforced cooperation” (p. 414). Schneckenberg further explained that, in order to meet these challenges, universities may act as institutional players at an inter-organizational level, potentially establishing strategic coalitions within consortia to strengthen mutual interests and to better compete for funding. While processes of innovation may be explored through a technological or sociological lens, there is also a persistent business perspective related to innovative expansion of educational markets, differentiation, and improved efficiency.

Another related dimension of this discourse is the idea of "disruptive innovation." After an initial introduction in 1995 (Bower & Christensen), Christensen then revised his theoretical approach in a series of articles in his work with Raynor (2003) and with Anthony and Roth (2004). The later model suggested that an innovation can create a new market and value network that eventually disrupts an existing network, displacing established market leaders and alliances. Christensen subsequently co-authored a book exploring the potential impact of technology-based disruption on the field of education (Christensen, Horn, Caldera, & Soares, 2011). In particular, the authors advanced the idea that a technological innovation can support transformation of a particular process from being complicated, exclusive, and expensive to being simple, accessible, and affordable. While enthusiasts of technology-based changes to teaching processes have promoted the idea of disruptive innovation, there has recently been some backlash evident in both popular and scholarly works. Thought-leaders who have taken a more critical view of the inevitability and the underlying motivation for advancement of this paradigm include Watters (2013), Groom and Lamb (2014), and Stansbury (2015).

**Summary of Research Themes**. This review of the themes evident in the research literature reflects an ongoing discussion of the potential for elearning to resolve high-level challenges within the sector and frequent linkage to the idea of innovation and transformation.
While I found little research literature specifically addressing the exploration of elearning policy and strategy at the system level, the discussion is often embedded in the larger discourse on the evolution of the purpose and value of higher education. The context for this study is thus a period of increasing interest in online learning in the research community, with scholars from a range of disciplinary areas introducing methodologies to interpret the impact and outcomes of this evolving vehicle for educational program delivery. The relevant literature on this topic runs along economic as well as sociological axes, and serves as a bellwether for broader change in higher education. The diversity of paradigms evident in the research sets the stage for the focus of this study, which aims to provide an overarching framework for mapping this rapidly evolving landscape.

**Social Context: Turbulent Times and Changing Attitudes of Academic Leaders**

There is evidence that an increasing proportion of higher educational institutions in both the USA and some Canadian jurisdictions see online education as a critical component of their long-term strategy. Yet, this increase in adoption of elearning is occurring in an environment where there are significant differences of opinion on its value. The well-known Babson Survey Research Group annual report recently noted that almost 70% of 2800 chief academic officers surveyed across the USA confirmed that “online education is critical to their strategy” (Allen & Seaman, 2013, p. 4). However, this same group of respondents estimated that only 30% of their faculty members accept the value and legitimacy of online education (Allen & Seaman, 2013, p. 27). This tension is articulated in a media article from that same period, reporting the impact of the MOOC phenomena on instructors, as well as academic leaders. The journalist suggested:

For years, elite institutions appeared to view online courses as higher education’s
—good enough for for-profit institutions and state universities, maybe, but hardly equivalent to the classes held on their own campuses. Now these high-profile professors… are signalling a change of heart that could indicate a bigger shake-up in the higher-education landscape. (Kolowich, 2013)

Both the Babson survey data and the Kolowich article on the impact of the MOOC phenomena reflect a shift to a new level of acceptance of fully online learning, particularly among universities that had not previously considered this modality as a viable option. A comprehensive post secondary education (PSE) study, "Preparing for the Digital University" (Siemens & Dawson, 2015), has provided an overview of the history and state of elearning, as well as other related research. In the introduction, the editors have noted the following:

The world is digitizing and higher education is not immune to this transition. The trend is well underway and seems to be accelerating as top universities create departments and senior leadership positions to explore processes of innovation within the academy. (p. 7)

The authors also promote use of evidence-informed planning that draws on the existing body of research within this domain.

In terms of operationalizing delivery of fully online courses, a Campus Computing Project survey of 183 institutions showed that a majority of institutions either had reorganized, or planned to reorganize management of online learning (Green, 2010, p. 10). Their “Managing Online Education” survey was also administered in Alberta and BC in 2012, with similar results (Belshaw, 2012). According to the published report, the eighteen Canadian PSE institutions that responded to the survey all indicated that “online learning figures prominently in institutional long term strategies” and “nearly 40% have developed strategic plans strictly
focused on educational technology and online learning" (p.1). Within Ontario, this trend is also reflected in a white paper published by Contact North (2013e), which noted:

While interest varies significantly across the sector, there is widespread agreement that online learning is playing an increasingly important role in Ontario’s colleges and universities. Notwithstanding the outliers in both directions (those for whom online learning is critical to their strategic planning and those for whom it is not a current priority), most presidents acknowledge the increasing importance of online learning, whether or not it is in the forefront of their thinking or strongly represented in their individual institutions. (p. 8-9)

The investment of resources in capacity development in the arena of online learning is particularly notable in the face of fiscal challenges both locally and within the provincial budgets (Weingarten, 2011; Bradshaw, 2013). Based on the evidence gathered from scholarly studies and white papers, and in spite of resistance, policymakers and university leaders appear to be devoting significant attention to online learning as a strategic priority.

**Growth in Online Learning**

Increased attention to online delivery models is also manifested in the continued growth of enrolments in online courses in many jurisdictions, including the USA (Allen & Seaman, 2013, Allen & Seaman, 2014; Allen & Seaman, 2015). Over many years, this well-known series of annual reports has indicated continued increases in American publicly-funded and not-for-profit institutions, though notably in 2015 the numbers dropped slightly in private for-profit institutions (p. 13). The decline in private online education has been linked to public criticism of the quality of its education and high rate of student loan defaults (Gillespie, 2015). Regardless of concerns regarding private online university programs in the US, there are
indications of delayed, yet steady growth patterns in public institutions in Canada (CVU, 2012). A few white papers and reports commissioned by government agencies to inform policy development processes have attempted to compare enrolment data both within Canada and internationally (Kearns, 2002; Anderson et al., 2006; CCL, 2010). Yet aggregated historic data to confirm the provincial patterns of student participation specifically in Ontario’s online courses and programs has been scarce. Findings of a survey of Ontario post-secondary institutions 2010 elearning enrolments published by the MTCU in 2011 served as a widely referenced data point for several years (CVU, 2012; Contact North, 2012; Council of Ontario Universities [COU], 2014a; University of Ottawa, 2013). The data posted on the COU web site stated the following:

- Ontario universities already offer students a robust online learning experience. In 2012-13, about 195,000 undergraduate and graduate students registered in e-learning courses. Currently, more than 3,100 online courses and 133 fully online programs are available across Ontario’s 21 publicly funded universities. (COU, 2014a)

These numbers indicated that fully online learning already had a solid presence in Ontario, despite the lack of jurisdictional coordination across the university sector.

**Chapter Summary**

This cross-disciplinary review shows that, while there are diverse paradigms underpinning analysis discussed in the scholarly literature, there are overarching patterns reflecting a general perception of the importance of elearning strategy. Firstly, a pattern is seen among North American university leaders who are shifting toward increased acceptance of online learning and corresponding investment of institutional resources in this domain. Secondly, there is evidence of persistent quantitative growth in online learning activity and
infrastructure development in the post secondary sector in both the USA and Canada. Both of these trends have been reflected in the mainstream media, as well as academic channels. Although I found limited scholarly research exploring developments at the system-level, the wide-ranging discourse and increased attention to the elearning domain have had the potential to impact policy process during the period that is the focus of this study.
CHAPTER 3
THEORETICAL CONSIDERATIONS

In this chapter, three relevant models for understanding policy process are first described, as context for the research methodology that underpins this study. To set the stage for a study of the drivers that are important to online learning, Duus' (2009) four ideal-type paradigms for the development of elearning strategies are then introduced as a frame for analysis. This theoretical framework is useful for articulation of a method of analysis that acknowledges the intersection of economic and sociological orientations described in the previous chapter. A description of Argyris and Schon's model of theories of action (1977), and its applicability to this study are briefly explored. As the influence of the broader global and national education sector and elearning initiatives are germane to the research, I then conclude the chapter with an outline of the key ideas that are the basis for the concept of a policyscape.

Policy Process

Our understanding of the development of educational policy in this domain can be informed by well known models such as the "garbage can" approach to policymaking in the university context (Cohen, March & Olsen, 1972). This model presents a non-linear process, where the policy problems and aims are not clearly defined, and decisions are an outcome of interpretation of relatively independent streams within an organization (Cohen et al., 1972, p. 2-3). These authors noted that problem identification, proposed solutions and the choice of approach to the implementation process are often "dumped" together, while participants who influence the policy process come and go. An interesting feature of the garbage can model is that the definition of problems is uncoupled from the choices made (Cohen et al, 1972, p. 16). The idea of variance in the interpretation of the purposes and goals of elearning across
stakeholder groups is relevant to this study, in particular the notion that problems to be solved by an elearning policy solution introduced by the government are open to interpretation.

Extending the foundational ideas in the garbage can model, the "multiple streams" approach (Kingdon, 1984) is also characterized by fluidity in alignment of issues, solutions and political circumstances. Like Cohen et al (1972), Kingdon argued against rational processes, noting that three metaphoric streams may converge to advance policy implementation: a problem stream, a policy stream, and a politics stream (1984, p. 16-17). The problem stream refers to articulation of the issue to be addressed, the policy stream reflects development of possible solutions, and the politics stream pertains to changes in government or in public mood. While this model was developed from case studies situated in the US federal government, the insights are applicable in other contexts. Kingdon also asserted that these streams need not operate in sequential order, and can evolve independently prior to convergence in a "policy window" of opportunity. The idea that a problem or issue can evolve and be re-framed by different actors in a policy community is useful to this study given the analytical focus on a range of paradigmatic perspectives within the higher education community. The idea of optimal timing is also a concept that is relevant to this study.

Similarly, Trowler (2002, p. 2) noted that a view of processes within the educational policy domain as rational and purposive “fails to capture adequately the messiness of policy-making and its implementation.” He explored the complexity of diffusion of ideas as strategies and practices filter through an educational system down to the institutional level. Trowler suggested that the diffusion results in expression of a range of interests and perceptions about the nature and relevance of particular policies at different levels within a given system, such as those occupied by the stakeholder groups that are the subject of this study. Trowler cited the
1987 work of Reynolds and Saunders, describing their model of an “implementation staircase" (2002, p. 3). He also noted that Lingard and Garrick, and also Gale built on this idea, suggesting that as policy is refracted to different levels of the staircase, implementation gaps might appear, with differences between original purposes and actual outcomes becoming evident (Trowler, 2002, p. 3). Borrowing from Trowler's work, this study focuses on varied perceptions at the top-most tiers of the staircase. Normally this would be seen to be the national and institutional levels (Trowler, 2002, p. 4). However, given our uniquely de-centralized Canadian model, in this study the articulation of policy direction within the Ontario provincial government (including the premier’s office and the MTCU) is considered as being the macro-level, while the pattern of response of the representative organizations within the province are considered to be the meso-level. As noted previously, the third level is the institutional response. Further steps down the staircase, including departmental and individual instructor perspectives, are beyond the scope of this study.

In this thesis, the analysis takes the form of comparison of commonalities and differences between groups within the active policy community, mapping the range of paradigms and the dynamic within the sector. Given the inherent "messiness" in policy process, as described by Cohen et al, Kingdon and Trowler, the approach taken aims to demonstrate the range of possible framings of policy issues, thereby raising institutional leaders' and policymakers' awareness of the potential responses to strategic elearning initiatives. Of particular interest are drivers that influence the political agenda, or what Kingdon has described as the political stream (1972, p. 17). As noted in the research questions, another overarching goal of this study is to contribute to the scholarly literature on the influence of broader global influences, or policyscapes, on policy implementation at the system level. The
concept of policyscapes will be explored later in this chapter.

**Ideal Types**

This study draws on qualitative methods to address the research aims and represents a social constructivist viewpoint, a perspective that assumes that individuals develop subjective meanings from their experiences and that those meanings are directed toward understanding of the world in which they live and work (Creswell, 2009, p. 8). In particular, the aim is to illuminate the viewpoint of the “other” using an ideal-typical framework to guide an iterative mapping process. In this case the other takes the form of representative stakeholder groups within the provincial university policy network who are responding within the broader policyscape context. Multiple data sources have been combined to allow a comprehensive analysis of the symbolic models and factors that are perceived by those groups to be influential in the process of operationalizing elearning strategy within Ontario universities. Given that the study aims to provide an overarching mapping of a range of viewpoints and ideological perspectives, Weber’s concept of the ideal type has been adopted as a heuristic tool to support comparative meta-analysis across a range of stakeholder groups within the elearning policyscape. In his seminal work, *The Methodology of the Social Sciences* (1949), Weber describes an ideal type as being

... formed by the one-sided accentuation of one or more points of view and by the synthesis of a great many diffuse, discrete, more or less present and occasionally absent concrete individual phenomena, which are arranged according to those one-sidedly emphasized viewpoints into a unified analytical construct. (p. 90)

As noted in Hekman (1983), Weber's approach is unique in that facts from which an ideal type is constructed must be seen in terms of "cultural significance," or in other words, the meaning
that the social actors bestow on their actions (p. 122). This aligns with the social constructivist approach of this study.

Given the ideal-type model can support application of diverse theoretical lenses on the same topic, a unique form of meta-analysis can be achieved by crossing both socially and economically situated paradigms, thus allowing for consideration of the viewpoint of the "other." The framework proposed by Duus (2009), shown in Figure 1, presents four possible paradigms for development of elearning initiatives using a Weberian ideal-type framework as a heuristic aid.

![Figure 1. Four ideal-type elearning paradigms. Reprinted with permission from “A Socioeconomic Approach to the Development of E-learning,” by H. J. Duus, 2009, E-learning & Education (eleed) Journal, Issue 5, Section 4.](image_url)

Through exploration of evolving relationships between key stakeholder groups within sector,
the findings of this study rise above a simple nomological framework to allow a more nuanced interpretation of the dynamics at play and the resulting outcomes. Use of this dual-axes model is foundational to this study, providing a structure for the mapping of elearning paradigms and strategic drivers prioritized by various stakeholders who are influential within the Ontario system. The characteristics of these four ideal-types can be summarized according to the four paradigms proposed by Duus (2009): technological, content-based, pedagogical, and market-based. Key points from his description of these four models follow.

**Technological.** These paradigm stakeholders typically take a business perspective, and see elearning primarily as a technological challenge, with development mainly driven by technology focused on "software programs, networks, multimedia and portals for elearning" (Duus, 2009, section 4.1). Duus notes that they are concerned with transfer and transmission models and often focused on possible cost savings while upholding learning quality. However, this perspective is not market-oriented, but rather described as following a production orientation. Duus further notes that it is suitable for low complexity transmission-model teaching, rather than advanced learning and creative problem solving.

**Content-based.** The proponents of this view see elearning as an “opportunity to electrify or 'e-ase' traditional chalk and talk teaching” (Duus, 2009, section 4.2). This typology maintains traditional thinking in content and pedagogy, and also a traditional focus on provision by instructor. Duus suggests that there are many proponents of the content-based paradigm in educational institutions, particularly where elearning has been implemented without taking advantage of the interactivity made possible by more recent and advanced technologies.

**Pedagogical.** Representatives of this group believe that “pedagogy must guide the
development of elearning even if this means ignoring demands and constraints imposed by content, technology and/or markets/business” (Duus, 2009, section 4.3). Typically holders of this perspective are linked to academic research streams on elearning and are focused on the importance of deep learning processes. The author notes that those affiliated with the pedagogical paradigm view their ideas and actions as progressive, or perhaps even as avant-garde. Duus adds the caveat that this stance is difficult to sustain in the face of business demands or political reform pressure. He further notes that the pedagogical paradigm may be viewed differently by the public sector, university institutions, in comparison with a strictly pedagogical lens (Duus, 2009, section 4.3). Potentially in such contexts the framing is less avant-garde, but represents a key value that may be championed by instructors.

**Market-based.** The concept of a market orientation is linked to business economics and strategic market management. These stakeholders believe in adaptation of their “products, activities, culture and organization to the demands of the market in order to thrive and survive” (Duus, 2009, section 4.4). The market needs are seen to drive the system design, and thus also influence pedagogical models selected. Duus notes that in the market-based perspective, pedagogy, technology and content are secondary to factors that inform adaptation to market and business demands (Duus, 2009, section 4.4). This quite revolutionary model may present political challenges, in that organizations that are not able to survive globalized competition may potentially fail.

**Applying the framework.** While Duus' four ideal types were conceived as a model for analysis of smaller organizations, in this context ideal types can be used as a framework for understanding the alignment of paradigms within the arena of higher education policy process. Given the complexity that is prevalent in the area of elearning strategy, these four ideal types
will be valuable as an overarching heuristic aid to “facilitate the researcher’s grasp upon and comprehension of an amorphous and ceaselessly flowing reality” (Kalberg, n.d., p. 10). The analysis will also be concentrated on the intersection of economic and sociological orientations as reflected in this dual axes framework. As Duus' model will be used to further understanding particular to the current Ontario provincial context some adaptation is required to reflect the regional and historical context. Duus intended this model to be useful as a heuristic for analyzing paradigmatic viewpoints and thus charting the "political landscape" (2009, part 6, para 1). However, in the context of this study, use of the model deviates from the application outlined in the conclusion of his work, which recommended identifying and aligning one's organization with a selected paradigm to bring focus to goals and strategy (2009, part 6, para 6). In contrast, within this study the ideal types will be used to explore the dynamics of negotiation regarding policy implementation within the policy community and as a diagnostic tool to analyse the evolution of elearning strategy within the sector. According to Duus, the ideal type is useful in exposing both polarizing stances and integrative approaches in strategy development. He recognizes that the same organization can "encompass several attitudes, notions and groups belonging to each of its paradigms" (2009, part 6, para 5) and that a range of levels of application such as organizational, network-based or national contexts are possible (2009, part 6, para 7).

Another framework for understanding the dynamics of interpretation and response across the sector is through consideration of the relationship between "espoused theory" and "theory-in-use" (Argyris & Schön, 1974). Espoused theory is the worldview and values on which people believe their behaviour is based, while theory-in-use is the worldview and values implied by their actual behaviour, or the maps they use to take action. Argyris (1980)
suggested that improved effectiveness results from developing congruence between theory-in-use and espoused theory, as individuals are able to make more informed choices about the actions they take. Analysis of the paradigmatic viewpoints evident across the implementation staircase will also identify points of dissonance and points of alignment using Argyris and Schon's framework. Also, public communication and expression of intention may vary from the "backstage" reality of policy and strategy implementation.

**Policyscape**

The study is also informed by, and informs, the existing body of scholarly work related to the concept of policyscape. Carney (2011) described the educational policyscape as being made up of policies and practices, influenced by globalization and thus de-territorialized beyond the place and space of discrete state school systems. This builds on his earlier assertion that system studies of educational policy reform and the role of the state requires understanding of the ongoing interconnection of educational phenomena on a number of levels (Carney, 2008, p. 68). These levels include: vision and values, management and organization, and learning processes. Carney (2011) noted the importance of divergent and contradictory experiences of actors involved in policy making as they guide the direction of state system strategy, while at the same time negotiate their own subjective context and meaning-making.

A policyscape has also been described as an "ensemble of policy ideas and conceptual frameworks... that are shared by political actors operating on multiple scales, influencing the way these actors enact educational policy" (Verger, Novelli & Altinyelken, 2012, p. 12). Stromquist (2013) asserted that this concept is applicable not only transnationally, but also may be influential within a given country, or in this case within a given province. This study aims to calibrate the influence of the policyscape within Ontario, as the policy community responds to
the potentially destabilizing phenomena of online learning. Responses of either change or resistance to new policy and practice may emerge. There may be varied reactions to new revenue generation goals, competitive rankings, funding priorities, corporate-style oversight, shifting responsibilities and government initiatives. Stromquist placed importance on the degree of transformation versus preservation of policies and practice, or “ruptures and continuities” occurring within universities today, noting that such stock-taking considers forces and instances of action in unexpected or sometimes opposing directions (Stromquist, 2013, p. 223). What Stromquist described as the "breaks and continuities in institutional identity norms and practices" (2012, p. 223) are particularly visible within the arena of online learning in Ontario, given the rapid evolution of policy direction as well as the growth in this domain.

Stromquist’s concept of the policyscape as a constellation of policy prescriptions legitimized through institutional “emitters” (2013, p. 223) is particularly valuable in the analysis of the impact and dynamic of policy process in this context. Emitters could be influential individuals, programs or models for policy implementation that garner national or global recognition. Stromquist further characterizes these influential paradigms as “symbolic models of what is suitable for contemporary society” and noted that the unit of analysis is “not the country or the institution, but rather the set of dimensions that comprises a particular policyscape.” In this study, the scope of global, national and local influence is assessed, with emphasis on identification of significant emitters and their impact on the Ontario university sector. The concept of the policyscape thus provides a foundation for understanding the implications of both ruptures and continuities. These breaks and continuities are evident across hierarchical levels of the implementation staircase in the form of varied perspectives on the goals and purposes of Ontario’s online learning initiatives.
Summary of Literature Review

The literature review that has been presented in Chapters 2 and 3 provides the scholarly context for the current study. In the previous chapter my focus was on the existing body of literature that addresses conceptions of the value and purposes of e-learning strategy and policy implementation in general. A range of theoretical approaches have been considered as the comparison of a viewpoints grounded in diverse paradigmatic models is foundational to the research design method for this study. In this chapter I have outlined the theoretical perspectives of ideal types and policyscapes, developing a conceptual framework for the analysis. In order to illuminate the viewpoint of the “other,” an ideal-typical framework is used to guide an iterative mapping process. This approach allows for addressing of diverse viewpoints, drivers, strategic approaches and outcomes of the policy incubation process. The analysis of policy process in the Ontario provincial context is also considered using the policyscape model to provide global context for local events. The following chapter builds on this theoretical grounding, as the methodology and research design for the study is described.
CHAPTER 4
RESEARCH DESIGN

The intent of this two-phase, qualitative study is to analyze how the challenge of strategic positioning for success in response to the shifting elearning policyscape is being conceptualized and realized across macro-, meso-, and institutional levels of the Ontario university sector. In order to investigate the nature and breadth of the impact of new online learning strategy initiatives, data were collected for analysis across these multiple levels within the same jurisdiction, providing the foundation for a comprehensive vertical case study (Bartlett & Vavrus, 2014). The research design involved a number of interlinked steps to achieve a nuanced mapping of elearning strategy paradigms, ruptures and continuities evident within our current university policy community as they evolved during a time period of intense change.

The development and design of this study addresses the stated primary research question:

**How have symbolic models for strategic success in the shifting elearning policyscape been conceptualized and integrated across the Ontario university sector?**

As noted previously, additional sub-questions informing the study include the following:

1. How are dominant elearning paradigms - based on Duus' ideal types (2009) – reflected within the macro- and meso-level public messaging on strategy and policy?

2. How do those paradigmatic messages compare with viewpoints and responses to evolving elearning strategy and policy within intermediary organizations in the sector?

3. How are Ontario universities navigating provincial messaging on elearning, global
influences, and internal pressures, as reflected in their strategic responses; and

4. How does the combination of the broader pollicyscape and the provincial initiative influence the interpretation of the goals and purposes of elearning across these three steps of the policy staircase?

To ensure currency and relevance, data collection and analysis focused on the time period commencing with the March 2010 Ontario premier’s throne speech and concluding in February 2015. The throne speech was the event chosen as a starting point given the unexpected announcement of the premier’s specific intention to create an Ontario Online Institute at that time. The interview and document analysis data collection timeframe spanned a dynamic five-year period of policy negotiation, ending in early 2015 when the Ontario Online Learning Consortium had established a functioning Board of Directors to provide direction as an arms-length agency of the government. Particular attention was given to the dynamics of tension and alignment, and the impact of the new policy directives evident in the intermediary organizational and institutional responses. A unique feature of this research is the application of a method of meta-analysis that can encompass various worldviews and disciplinary strands evident in policy documents, related reports, white papers, and pertinent scholarly literature, as well as perspectives reflected in organizational and individual communications. This compiled inventory of viewpoints, responses and reactions allowed analysis of the evolving pollicyscape during the period being considered. The result is presented as a vertical case study, exploring diverse perspectives within the sector and situating varied interpretations within a broader context of cultural, historical, and political factors. More specifically, a policy sociology approach was used to examine the connection between strategic goals proposed by the provincial government and the responses observed among provincial organizations and
individual institutions.

**eLearning Parameters**

Given that this study is focused on the Ontario context, the previously noted MTCU definition of “elearning” was used: web-based learning outside of the physical classroom. It should be noted that the quantitative government report data referred to in this study is further defined as a fully “online course” as having at least 80% of instruction online (University of Toronto, 2013). The study is primarily concerned with fully online course and program delivery. However, in some cases data regarding other technology-enhanced elearning models were included where pertinent to the institutional strategy.

**Data Collection Methods**

This research study design involved collecting data related to provincial online learning policy and strategy in two phases, each of which included both document analysis and an interview component. The sequence of data collection phases began with the upper levels of the policy implementation staircase, then moved to the institutional level. The methodology, depicted in Figure 2, is based on models for qualitative research design described by Creswell (2009). In order to explore this unique period of rapid change in the elearning policy

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**Figure 2.** Visual model of research design. The study is comprised of two sequential phases of qualitative data collection and analysis, followed by integrated interpretation.
landscape, the data collection focused only on the time frame from March 2010 to February 2015. In combination with document analysis, the qualitative interviews are a useful data collection tool allowing capture of in-depth personal reflections and meaning-making that can be difficult to extract using quantitative methods, such as a questionnaire (Creswell, 2009, p. 181). Together, these data sources, drawn from three levels of the university sector in the province of Ontario, were used to create a picture of the interpretation of the policy direction across 1) published discourse and description of macro-level strategic goals; 2) meso-level organizational reaction; and 3) the institutional strategic response to these new initiatives.

**Methodology Components**

**Phase 1.** The study began with an analysis of public documents that reflect the conception and strategic positioning of provincial eLearning initiatives by various high profile stakeholder groups within the Ontario system. Sources of document data included policy documents, discussion papers, media releases, reports and web site posts published by the provincial government and intermediary agencies. The themes, motivations and priorities reflected in these documents were coded, categorized and mapped according to the ideal-types represented in Duus’ framework (2009). These documents have been analyzed in terms of the goals and values espoused by these agencies, with a focus on the dynamics of the policy community and the range of viewpoints expressed in response to the provincial initiatives during consultation and implementation stages. A report summarizing the outcomes of Phase 1a document analysis was prepared, describing the four paradigmatic perspectives in Duus’ ideal-type model and grouping the themes, goals and values accordingly. A list of all public documents included in the analysis of macro- and meso-level communication is provided in Appendix A.
In Phase 1b, to confirm the document analysis, four key informants well positioned in the policy community were provided with the Phase 1a document analysis summary report in advance, and then interviewed to verify the themes and responses identified through the mapping process. These informants included representatives of the COU, the Ontario Confederation of University Faculty Associations (OCUFA), the Ontario Undergraduate Student Alliance (OUSA), and the Ontario University Council on eLearning (OUCeL). Their contact information is available through their respective organizational web sites and published materials. Recommendations for further documents for review were solicited to ensure the document analysis was thorough and comprehensive. Their observations on prevailing tensions, posturing and rhetoric, and the role of key "emitters" influencing developments in Ontario were also probed and recorded as supplementary data for the study. The guide used for Phase 1b interviews with key informants is included in Appendix B.

**Phase 2.** In Phase 2a, institutional reports and planning documents related to elearning strategy published by universities within the Ontario system served as an important source of information. In addition to activity reports, descriptive data were collected regarding communication on strategic direction, resourcing priorities, and internal and external factors driving decisions. As this stage overlapped and was conducted in parallel with the subsequent Phase 2b interview stage, additional documents for analysis were identified during conversations with the senior campus administrators.

Several sources of data were then used to evaluate the alignment of the MTCU initiatives with the evolving elearning capacity development at the institutional level. Firstly, past Multi-Year Accountability Agreement (MYAA) activity reports that the MTCU required all universities to publish annually up until 2014 were retrieved from institutional web sites. A list
of MYAA report references for all universities in the province that were included in the analysis is provided in Appendix C. These reports reflect the operationalizing of elearning strategies over the period of the study and should not be confused with the differentiating Strategic Mandate Agreements (SMAs) negotiated between each university in Ontario and the MTCU beginning in 2014. The MYAA data sets were used to assess overall patterns of activity in course offerings and registrations across all universities within the province over several years.

In addition, individualized SMAs that each university developed in negotiation with the MTCU as part of their new differentiation and accountability framework were retrieved and analyzed. For the first cycle in 2012, institutions submitted draft proposals. In the subsequent cycle in 2014, the SMA template included a section on teaching and learning that provided an opportunity for universities to develop institutional metrics or report on the elearning activity within their university. A list of SMA references for all universities in the province that were included in the analysis is provided in Appendix D. A further source of information was a range of institutional strategic plans, elearning task force recommendations, or reports to governing councils from universities across the province. A list of the internal institutional strategy documents included in the analysis is provided in Appendix E. Together these data sources were used to build a picture of the activity in this domain, as well as the plans and aspirations of Ontario universities.

In Phase 2b, the final step in the data collection process, an additional series of interviews engaged a broad sample of participants from universities across the province. Insights gained through the process up to this point were used to refine the framing of the qualitative, open-ended, semi-structured interviews. The aim of this second interview stage
was to explore the lived experiences and perceptions of professionals who have leadership roles in the field of online learning at our public universities. The particular focus was the response to the policy and strategy directions communicated from higher levels in the policy implementation staircase. Interviews were conducted between May 13 and August 31, 2015. During this period, individuals from all universities in the province were invited to participate, except the home institution of the researcher. Each university has a senior administrator, director or manager responsible for fully online learning activities within the institution. Generally these are not academic appointments, but rather most commonly directors of elearning support centres or other similar functions. Of the possible 20 senior administrators from across the province identified as the target population for the semi-structured interview process, 14 agreed to participate. The University of Toronto was excluded as I myself hold the position of administrative lead on the Online Learning Strategies portfolio and my input would bias the findings.

The target interviewees were primarily the institutional representatives of OUCeL, a professional group that meets twice annually to discuss matters of common concern. In most cases, these contacts were published on the council web site. Where no institutional representative was listed, a search within the particular university web site was undertaken to identify the appropriate representative. The interviews were conducted by telephone, by Skype or in person, and ranged from 20 to 40 minutes in length. From the total population sample, the consenting participants represented diversity of institutional size and focus: large and small, research-intensive and teaching-oriented, and from a range of geographic locations within the province.

In the first stage of each interview, participants were asked to reflect on the reaction of
their institutional leaders and on the strategic response to the ideas being put forward by the provincial ministry. In the second stage of each interview, participants were asked to report on the impact of the policy development process on the implementation of their elearning initiatives, including strategic alignment, impact on operations, challenges and opportunities. Themes explored during the interview process included observations on communication, changes to organizational structures, and tactical linkages to cost, quality and access. The guide used for Phase 2b interviews is provided in Appendix F.

This interview component allowed for a more socially situated exploration, delving beyond the “front of stage” public discourse and descriptive data available through public sources, to build out response patterns and emergent themes. The goal was to expose the narrative regarding reaction to the policy “back stage” at the institutional level, once again using Duus' ideal types as a framework for understanding a range of paradigmatic viewpoints. A supplementary framework for understanding the response is through consideration of the relationship between espoused theory and theory-in-use (Argyris & Schön, 1974). Understanding both the espoused framing and the common theory-in-use practices related to policy and strategy implementation further down the policy staircase provides an opportunity for insight into effective policy development processes.

Together these components of data collection and analysis supported exploration of the primary research question of this study: How have symbolic models for strategic success in the shifting elearning policymakscape been conceptualized and integrated across the Ontario university sector? Each of the four research design phases described above aligns sequentially with one of the four research sub-questions. The methodology progresses through data collection first at the macro- and meso-levels of the administrative hierarchy, before moving to
sources at institutional level. Table 1 shows the alignment of the Phase 1 methodology and source of data at the macro- and meso-level with research sub-questions #1 and #2.

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<thead>
<tr>
<th>Methodology Phase</th>
<th>Source of Data</th>
<th>Research Sub-Questions</th>
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<tr>
<td><strong>Phase 1a</strong></td>
<td><strong>Source Materials</strong></td>
<td><strong>Sub-Question 1</strong></td>
</tr>
<tr>
<td>Macro-/Meso-Level</td>
<td>• Publicly communicated positions on strategy reflected in documents published by Ontario Government, MTCU, and intermediary organizations such as COU, OCUFA, OUSA</td>
<td>• How are dominant elearning paradigms - based on Duus' ideal types – reflected within the macro-and meso-level public messaging on strategy and policy?</td>
</tr>
<tr>
<td>Document Analysis</td>
<td>• Timeframe: Published between March 2010 and February 2015</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Investigation, interpretation and categorization of primary source documents</td>
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<tr>
<td></td>
<td>• Macro-level and meso-level patterns mapped and compared using Duus’ ideal types as heuristic framework</td>
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<tr>
<td></td>
<td>• Summary of document analysis prepared and shared with key informants for confirmation</td>
<td></td>
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<tr>
<td><strong>Phase 1b</strong></td>
<td><strong>Interviewees</strong></td>
<td><strong>Sub-Question 2</strong></td>
</tr>
<tr>
<td>Key Informant Semi-Structured Interviews</td>
<td>• Sample of key informants are experts who are current or past leaders within intermediary organizations such as COU, OCUFA, OUSA, OUCeL</td>
<td>• How do those paradigmatic messages compare with viewpoints and responses to evolving elearning strategy and policy within intermediary organizations in the sector?</td>
</tr>
<tr>
<td></td>
<td>• Additional reflections and interpretations of key informants collected during interview process.</td>
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<td></td>
<td>• Factors influencing events and advocacy efforts explored through probes.</td>
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Table 2 shows the alignment of the Phase 2 methodology and source of data at the institutional level with research sub-questions #3 and #4. While Phase 1 was completed in full before

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<th>Methodology Phase</th>
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<th>Research Sub-Questions</th>
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<tr>
<td><strong>Phase 2b</strong></td>
<td><strong>Source Materials</strong></td>
<td><strong>Sub-Question 3</strong></td>
</tr>
</tbody>
</table>
| **Institutional Document Analysis** | • Publicly available Ontario university institutional strategic planning and advisory group reports, government data reports, and Strategic Mandate Agreements  
• Timeframe: Published between March 2010 and February 2015 | • How are Ontario universities navigating provincial messaging on elearning, global influences and internal pressures, as reflected in their strategic responses? |

| **Phase 2a**      | **Interviewees** | **Sub-Question 4** |
| **Institutional Leader Semi-Structured Interviews** | • Sample population of Ontario university senior administrative leaders responsible for e-learning operations; primarily members of the OUCeL professional network | • How does the combination of the broader policyscape and the provincial initiative influence the interpretation of the goals and the purposes of elearning across three steps of the policy staircase? |
Phase 2 commenced, there was some overlap between the document analysis and the interview process in the second phase.

**Interpretation of Entire Analysis**

The joining of both phases of the document analysis and interviews in the final analysis advances our understanding through articulation the relationships across the connected data sets. This supports a better understanding of the dynamic and impact of policy and strategic direction, including the influence of the overarching policyscape. Themes, messaging and directives from the document analysis phases, as well as interview transcripts, were coded, categorized and analyzed using NVivo software. Duus' ideal-typical framework provided an initial schema for categorization and comparison of responses across the various stakeholder groups, with additional themes being added iteratively as they emerged through the analysis process. Minor adaptation of Duus' framework, informed by this iterative process, reflected the context specific to Ontario universities.

This mapping of symbolic conceptions of elearning strategy implementation supported analysis and comparison of responses across stakeholder groups, contextualized by consideration of the influence of the broader elearning policyscape. Particular attention was paid to interpretation of the policyscape as reflected in meaning-making and motivations at each of the three levels on the “implementation staircase” within the sector. The values and purposes of elearning articulated at each level were compared to identify situations of tension and alignment in paradigmatic viewpoints. In addition to mapping a range of stakeholder viewpoints, the study collected quantitative evidence to evaluate the level of capacity prior to government intervention, and to assess whether there had been any systemic change toward stated aims of policymakers. As a whole, this analysis served to illuminate both ruptures and
continuities in current elearning strategy alignment within Ontario university sector. This research design relied on inductive analysis, through exploration of the details of the data to identify important patterns.

In summary, Duus' ideal-typical framework was used as a heuristic framework for mapping and comparing themes evident in the published documents and in the policy process experienced by policy-makers, leaders and administrators across the sector. The aim of this integrated analysis was identification of models and significant themes in the discourse that influenced advancement of elearning policy and strategy, reflecting both economic and sociological orientations across various levels of system.

Methodological Limitations and Ethical Considerations

A problematic aspect of this project was the researcher's active participation in the community being investigated. Particular care was taken not to influence participants' observations captured during the interview process phase, nor to lead the discussion toward specific viewpoints or perceptions of causality. I observed the protocols and techniques for the semi-structured interview carefully to reduce my researcher bias to the degree possible. This was of less concern during the document analysis phases.

Reports and position papers analyzed were in some cases intended to "test the waters" or explore a response to a particular framing of the goals and implementation of a provincial elearning initiative. Interviewing of key informants provided additional context, to allow for more nuanced interpretation of the document analysis. However, the methodology assumes that quantitative data published in government reports were accurate, to the degree that reporting procedures are consistent within and across institutions. Where there were outliers, participants in the Phase 2 interview process were asked to provide clarification. However, data collected
from institutional strategic plans and SMA’s were considered differently, rather as an indication of strategic intent or aspiration to improve positioning within the internal and external environment. In general, senior administrators responsible for online education operations were able to answer questions regarding strategy, policy and practice at their institution based on their professional situation and experience. However, in some cases the completeness of information provided was influenced by their particular role and perspective within their institution.

The protocol for the proposed study was reviewed by the Educational Research Ethics Review Board at the University of Toronto. Interviews were undertaken only with the full consent of participants on a voluntary basis, and participants were assured of the right not to answer or to withdraw from the study without penalty. Examples of the participant consent forms are provided in Appendix G. Permission to make an audio recording of the interviews was confirmed through the consent forms, and participants were informed that complete transcripts of interview discussion would be provided for review and correction. To further protect anonymity, each "Key Informant" from Phase 1 and "Participant" from Phase 2 interviews was referenced by number or letter only. Interview data were stored on a secure, password-protected server at the University of Toronto.

Individuals were asked to present personal perspectives based on their own experiences rather than representing their organizations or institutions. However, it was important to eliminate the risk of professional repercussions for participants who might speak about issues particular to their workplace or comment negatively about the actions of senior leaders within their institution. In order to eliminate risk within the sphere of their professional roles, the participants' interview data were anonymized prior to analysis and identities are not revealed at
any point in discussion of the findings. Care was taken to avoid any explicit link to specific institutions in quoted interview material. Any description of institutional activity in the findings relied on categorization of institutions by general type in order to pull common themes together. For example categories include location (ie "urban" or "more remote" universities), or focus (ie "more research intensive" or "teaching-focused"). The target sample size is also sufficiently large to protect participants against identification.

With regard to document analysis and quantitative reports, public data related to institutional activities did not need to be anonymized. The ethics protocol for this study specifically noted that consent would not be needed from the individual universities as the institutional data for the document analysis component comes from reports and public documents openly available on the internet, and thus there was no need to seek consent. Institutions were only named in terms in relation to information in published reports and documents.

**Chapter Summary**

The overarching aim in the design of this study was to identify symbolic models for strategic success that are present in the shifting elearning landscape. The research supports deeper understanding as to how both sociological and economic paradigms are conceptualized and integrated through mapping of the communicated and enacted responses across organizational levels within the Ontario university sector.

In terms of a contribution to educational policy research, the study provides an opportunity for evaluation of a methodology that uses the ideal-type model as a heuristic aid for interpretation of a range of paradigms that are influencing policy development. This in turn supports exploration of the concept of the policyscape as tool for analysis of policy process. In
particular, the research illuminates the influence of global policy prescriptions on various stakeholder groups and the process of legitimization through significant “emitters.”

Finally, in practical application, this qualitative study improves our understanding of the factors affecting the community in several ways. Key dimensions explored include both the accelerated acceptance of fully online learning as a viable strategic choice, and the reaction to policy proposals within Ontario university sector in response to the winds of change. The analysis and findings serve as an early litmus test for support of emergent policy initiatives by those most directly impacted by the new directives. Both federal and provincial governments have increasingly emphasized new themes in education, including accessibility, marketization and labour force development (Fisher, Rubenson, Jones, & Shanahan, 2008). These new neo-liberal themes can be linked to use of elearning policy and strategy as an avenue to achieve the expressed goals of the provincial government (MTCU, 2012). However, they also have broader implications for understanding the evolution of our collective thinking regarding the emergent purposes and societal value of higher education.
CHAPTER 5
HISTORICAL OVERVIEW AND EVENTS IN ONTARIO

In this chapter I begin with historical overview of the development of technology-enabled learning in Canada since the early 1990s, setting the stage for recent events in Ontario. This is followed by a chronology of key events in Ontario during the period of 2010 to 2015, constructed through review of public documents and media reports. The accuracy of this timeline of events has been confirmed by the key informants through summary review and interview processes. Additional contextual factors that have been identified by key informants as being specific to the Ontario university sector setting in the period are then described to conclude the chapter.

Historical Overview

In order to understand the current crossroads of policy development, it is helpful to understand the evolution of the elearning landscape in Canada since the emergence of the internet and the rise of graphical browsers in the 1990s. Varied views on the affordances of fully online learning are evident in early public documents and commissioned reports. The discourse quickly broadened beyond the discussion of infrastructure access to include other considerations, such as sharability of elearning content, effectiveness of a range of modalities, faculty development strategies, innovative program formats, and pedagogical effectiveness. The following is a overview of developments at the federal and provincial levels from the early 1995 to 2010. During this period the general sequence of Canadian policy and strategy focus was infrastructure development, extension of skill capacity, and then program integration.

Pioneers - making elearning possible. In 1985, at the time of initial expansion of the internet, the earliest fully online graduate courses in Canada were offered at the Ontario Institute for Studies in Education (Harasim, 2000). Soon after, Contact North was founded in
northern Ontario, using a network of community access points to provide distance learning using internet and video technologies (McGreal & Anderson, 2007). Developments occurred at all levels of the education sector, with strategies initially developed for CD-ROM or local area network delivery expanding as the possibility of connections between multiple locations became more commonplace. A notable and influential Canadian project of this period was centred on development of the Computer-Supported Intentional Learning Environment (CSILE), a distributed learning platform supporting collaborative knowledge building among students of all ages (Scardamalia & Bereiter, 1993). Literature from this period positions Canada as a leader of development of expertise and infrastructure in the area of elearning strategy.

In early 1993, an active period of federal policy implementation commenced with Industry Canada introducing the Canadian Advanced Network and Research for Industry and Education (CANARIE) to support of data-intensive research and innovation. Not only did this initiative fund infrastructure development, it also supported development of content, applications and services that were carried on the national network (CCL, 2009). The nodes on the main backbone included universities, research institutes, hospitals and other organizations in a range of discipline areas. Between 1993 and 1998 an extensive physical network was developed to facilitate research and learning, with considerable focus on higher education institutions as the context for these activities. The well-known SchoolNet partnership program was launched in 1993 and became a model for educational network development, positioning Canada as the first nation in the world to connect its public schools and libraries to the internet (Historica Canada, 2013). By 1999, any Canadian public school or library could connect to what the federal leadership referred to as the “information and knowledge infrastructure”
(Whitehead & Quinlan, 2002, p. 2). In a well-known case study of the SchoolNet program, Tumin described the cultural context of the federal program as being “less a fixed plan than a continuously-evolving idea, animated by distinctively Canadian imperatives, driven by entrepreneurs in government and industry, buttressed by small wins and growing political support at small-town levels and at the highest levels of government” (n.d., p. 33).

This initial phase of Industry Canada funding lead into a period of several years during which federal ministries and national organizations commissioned a succession of reports. Typically these were vetted by their respective advisory committees and called for further national coordination of efforts and additional funding to ensure both economic and educational benefits could be achieved. Lifelong learning, digital literacy, accessibility and economic competitiveness were all themes that were common in the policy discussions. The need for a national strategy was also a common theme. Table 3 presents several examples from the period.

Reports and publications of this era reflect what Anderson et al. (2006, p. i) identified as the first stage in a common pattern of development of e-learning policy. This is a stage in which governments and agencies respond to a call for access and strive to make e-learning possible. Public documents of the period highlight potential gains in economic growth, educational quality and access to disadvantaged communities. The focus was initially on the development of physical network infrastructure and facilities, followed by human resource development and digital literacy as key priorities in these pioneering days of online learning (Anderson et al., 2006). In summary, the perception that technology-enabled learning was an important strategic direction clearly had traction in the policy community. There is ample evidence of a national interest in advancing infrastructure and capacity within this domain.
Table 3

Examples of early Canadian advisory reports on e-learning

<table>
<thead>
<tr>
<th>Organization</th>
<th>Year</th>
<th>Commissioned Report Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Information Highway Advisory Council (IHAC) of the Canadian Department of Industry</td>
<td>1997</td>
<td>Preparing Canada for a Digital World.</td>
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<tr>
<td></td>
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<td>- This lengthy report set the stage for the framing of computer and digital literacy as a key to success in the knowledge economy, and linking that capacity development to the public education system (The Information Highway Advisory Council, 1997; Whitehead &amp; Quinlan, 2002, p. 2).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- This document promoted the necessity of building a culture of lifelong learning. Funding was made available through their new Office of Learning Technologies (CCL, 2009, p. 89).</td>
</tr>
<tr>
<td>Council of Ministers of Education, Canada</td>
<td>2001</td>
<td>The e-Learning e-Volution in Colleges and Universities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- This report provided a further action plan for expanding online learning in Canadian post-secondary education to “meet the learning needs of individual Canadians, improve our economic competitiveness and sustain the health of our civil society in this new knowledge-intensive era” (Advisory Council on Online Learning, 2001, p. x). The document further advocated that online learning could “contribute to the quality, accessibility, mobility or portability, and relevance or responsiveness, of post-secondary education” (p. xi).</td>
</tr>
</tbody>
</table>

However, the question of how such a strategy might be operationalized on the national stage remained unanswered.

The Ontario university sector's lost years. During those early years of exploration of the potential of online learning, it is not surprising that provincial initiatives would introduce regional efforts given the decentralized governance of education in Canada, with authority devolved to the provinces (Fisher et al., 2009). For example, the British Columbia (BC) Centre
for Curriculum Transfer and Technology project provided early resourcing to support capacity
development in local institutions (Anderson et al., 2006; McGreal & Anderson, 2007). In 2002
the provincial government announced the creation of BCcampus to co-ordinate distance and
online education programs offered by their post-secondary institutions (BC Ministry of
Advanced Education, 2002). In addition to the launch of a single point of access for all online
programs, another significant change was the repositioning of the existing BC Open University
to the newly created Thompson Rivers University (McGreal, 2007).

Other examples of provincial initiatives that might have provided a model for Ontario
included the eCampus Alberta consortium of 15 colleges and institutes with collaborative
elearning programming and credit transfer (McGreal & Anderson, 2007). Some of the eastern
provinces also showed interest in this arena, with initiatives such as TeleEducation New
Brunswick and Tele-université du Quebec. This represents what Anderson et al. (2006) have
described as the second phase of elearning policy integration, in which governments strive to
integrate elearning into the education system, with strategies being linked to mainstream
programming.

During the first decade of the millennium Ontario saw very little coordinated province-
wide development. Interestingly, the well-known 2005 Rae Report on the state of post-
secondary education in Ontario mentions elearning only briefly, posing the question as to
whether there was a need for an Ontario-based institution “dedicated to distance and online
education” (Rae, 2005). The MTCU did continue to fund Contact North as an arm's length
organization providing infrastructure and professional development support to PSE institutions
offering online courses (Anderson et al., 2006; McGreal & Anderson, 2007). It should be noted
that to date Contact North has been focused mainly on support to college programs. A general
search for fully online courses in their online course directory listing showed 3,449 university offerings, compared to 15,077 college course offerings (Contact North, 2014b). Further, its function as the provincial portal is limited by its organizational mandate and governance structure. Notably, the Contact North Board of Directors only represents colleges and universities in northern Ontario (Contact North, 2014c).

One relatively modest provincial initiative that proved to have a surprisingly enduring impact was the Cooperative Learning Object Exchange (CLOE) lead by the University of Waterloo (McGreal & Anderson, 2007). The aim of the CLOE project was to advance community capacity for joint development and peer review of multimedia-rich learning resources. While inclusive of colleges, the membership of this Industry Canada funded initiative was dominated by the 18 university members of the network up until it ceased operations in 2008 (Educause, 2014; Tittenberger, 2009). While the repository did not survive, the idea of a community network of university academic technology administrators took hold. Its next incarnation was a “Summer Institute” model hosted by the COU and their Office for Partnerships for Advanced Skills (T. Carey, personal communication, September 9, 2014). Subsequently the OUCeL professional network was formed and is particularly noted here, as the representatives to this organization are a key stakeholder group whose conceptions of elearning are explored in this research study.

OUCeL served as a rare communication network among administrators in Ontario universities during a period when interest in online course offerings was growing steadily (Allen & Seaman 2013; Belshaw, 2012; CVU, 2012), yet provincial government policy directives were non-existent. While many other provinces advanced their online learning programs and integrated these initiatives with overarching policy strategy, the Ontario
government, including this premier’s office and the MTCU, remained silent on the matter.

**Federal research and development funding: passing the peak.** In terms of funded research and development (R&D), the first example of Canadian federal intervention to support innovative online learning initiatives was part of the TeleLearning Networks of Centres of Excellence (Simon Fraser University - Archives and Records Management Department, 2014). In the 1990s a total of $240 million was allocated to funding applied research in a range of fields, including the development and application of networked technologies in education and training (Fisher et al., 2009, p. 81). Subsequently, Canadian Advanced Network and Research for Industry and Education (CANARIE) provided elearning R&D funding beginning in the late 90s, and culminating in the pan-Canadian EduSource repository project. This latter comprehensive program targeted infrastructure for digital resource sharing and was aimed at increasing quality, efficiency and access across the country (McGreal et al., 2004). When the CANARIE funding program wound down in 2005 the resource repository and research program was not sustained, and the only enduring legacy is a self-funded network of about a dozen universities that have joined together as the Collaboration for Online Higher Education and E-Research (COHERE) organization (Downes, 2005; COHERE, 2016).

Issues related to the subsequent gap in funding for elearning initiatives and the need to revisit a broad research agenda was then taken up by the Canadian Initiative for Distance Education Research (CIDER) at Athabasca University, who commissioned a literature review of national elearning research agendas (Buell & Anderson, 2006). However, given their location in a small university research centre, the authors acknowledged the limited impact of such an undertaking on the establishment of a pan-Canadian agenda without significant funding. The call for federal coordination was repeated again in the 2009 report on the “State
of E-learning in Canada” published by the Canadian Council on Learning (CCL). This report included the usual call for additional funding, noting that in many Organization for Economic Co-operation and Development member countries the government plays a significant role in funding elearning projects. The CCL report also called for the development of a consensus regarding public policy at both the provincial and federal levels in order to meet emergent challenges (p. 96).

As funding for national initiatives waned, provincial jurisdictions increasingly turned to projects and programs within their own borders. Each of the provinces was thus left to chart its own course in terms of the development of elearning initiatives within the PSE sector, with varying results. In addition to the absence of a federal research and development program, the ambiguity in policy and strategy direction is clearly voiced in Muirhead's 2005 publication entitled "A Canadian Perspective on the Uncertain Future of Distance Education," which poses rather than answers questions arising for institutional leaders at that time.

In terms of the Ontario context, coordination of provincial efforts was particularly challenged by the highly decentralized governance of universities, each having been established through a separate Ontario Public Act (Clark, Moran, Skolnik & Trick, 2009). The provincial government left decision making to the individual institutions (McGreal & Anderson, 2007). As mentioned previously, the university and college sectors have a long history of differentiation, and are not well-integrated or articulated in Ontario (Fisher et al., 2008). While the colleges self-organized to offer shared courses through a common registration hub beginning in 1995 (OntarioLearn, 2016), no similar structure was proposed for the university sector prior to 2010. A review of Ontario’s provincial policy and strategy documents related to university sector elearning is conspicuous in the absence of political discourse or
initiatives aimed at advancing elearning program capacity during the first decade of this century. While administrators and policymakers lower on the administrative staircase made mention of this opportunity, no policy direction, incentives or guidance was provided at the provincial level. As noted above, the Rae Report (2005) was also notably quiet on this point. In terms of the Ministry of Training, Colleges and Universities, no funding programs were initiated and no data on institutional program offerings were collected. While two-thirds of universities in Ontario reported the existence of central administrative units to support online learning capacity (Maki, 2010, p. 7), it can be concluded that during the prior decade elearning was not a topic that was in the foreground of provincial policy directives, strategic planning documents, or R&D program outputs. Once the federal funding peak had passed, there were few government initiatives acting as incentives for the Ontario universities to become engaged in this domain.

Review of the historical background of elearning strategy in Ontario reveals very little direction from the Ontario government, or coordination at the institutional level within the university sector prior to 2010. Then policy and strategy directives and negotiation began to accelerate, as will be described in the next section.

**Recent Chronology**

The following is a chronology of key events in the online learning policy and strategy development process within the province of Ontario from 2010 to 2015. The timeline of events was developed as part of Phase 1a of the data collection process, constructed through analysis of published government communication documents, media reports, press releases and organizational responses. As noted in Chapter 4, the accuracy of the chronology and contextual details was confirmed by the key informants through summary review and interview processes
in Phase 1b.

**Early events.** The period of this study began with the provincial throne speech in 2010. At this time it was first announced that the provincial government intended to initiate what was referred to as the Ontario Online Institute (OOI) in order to improve access to higher education for students across the province (Government of Ontario, 2010a). The announcement was at the same time linked to the Open Ontario Plan economic policy initiative (Government of Ontario, 2010b). The government also set a target of 70% participation in higher education, thus linking online learning to a strategy for developing a labour force that could effectively support the emergent knowledge economy. The conception of a new institute to deliver online learning became the subject of much discussion and speculation, as no parameters or policy framework accompanied the announcement by the premier. A starting point for community discussion of possible models occurred when Dr. Grace Lynch of Open University Australia (OUA) was invited to present as part of the Conversations in Online Learning Series (Lynch, 2015), addressing the policy community on development of an online institute and related topics such as institutional agreements, admissions, student support, pedagogy and quality. The event was co-hosted by the MTCU, Ontario Undergraduate Student Alliance (OUSA), and the Higher Education Quality Council of Ontario. One of the key informants interviewed during the data collection phase of this study noted that this event subsequently led to a private meeting between Dr. Lynch and the Minister to discuss the OUA consortium model. A subsequent advisory report commissioned by the MTCU in 2011 suggested that a framework for providing greater access to flexible, high quality, publicly assisted education should be based on a collaborative network of the existing institutions, hence leveraging their services and structures to develop further capacity for support of online learning initiatives.
within Ontario’s post secondary sector (Jean-Louis, 2011). A number of lobby groups, including the COU, Colleges Ontario (CO), Ontario Undergraduate Student Alliance (OUSA), and the Ontario Council of Faculty Associations (OCUFA) all responded to the report with discussion papers in which recommendations as to appropriate strategies and priorities were put forth. As will be described in the next chapter, the viewpoints and paradigms presented were in many cases in opposition to the stated aims of the MTCU. The discussion was initially informed by consideration of models already established in other jurisdictions, including the OUA and also BCCampus in particular. Contact North was initially positioned with a leadership role on the strategy development, and their Director had been the "special advisor" who had drafted the 2011 MTCU-commissioned report. However, as noted by key informants in the Phase 1 interviews, the influence of Contact North was subsequently scaled back to a consulting and committee representation role.

**MTCU communication.** After a lengthy period during which no communication was forthcoming from the MTCU regarding their emergent strategy, an early version of an MTCU briefing document regarding broad ideas for transformation of post-secondary education in Ontario was leaked to the Toronto Star (Rushowy, 2012). This garnered considerable pushback from the sector. For example, a survey published by OCUFA indicated that faculty perceived moving to a high percentage of online courses would "undermine the educational experience" and "short-change students" (OCUFA, 2012). The MTCU eventually publically released a widely-distributed discussion paper entitled "Strengthening Ontario’s Centres of Creatively, Innovation and Knowledge" in June of 2012, with the stated goal of engaging in a consultation on transformative strategies. Within this discussion paper the MTCU advanced the idea that the triad of increased access, improved quality and cost savings might all being realized through
technology-enabled learning. The Ministry invited the stakeholder community to respond to these ideas and consider the potential impact on the Ontario PSE sector. A series of consultation meetings were held across the province. The meetings served as a sounding board for responses from university stakeholders, including faculty, administrators and students. However, the path toward articulation of an implementation strategy was interrupted by a series of changes in leadership later that same year. Provincial Premier, Dalton McGuinty, resigned in October 2012, and immediately afterward Minister of Training Colleges and Education, Glen Murray, resigned in November 2012 in order to become a candidate for party leader, slowing the momentum for implementation of a new initiative in the sphere of online learning.

While another period of silence regarding new directives settled upon the policy community following this leadership change, intermediary organizations continued to advocate for their preferred course of action. OUSA (2013) released a white paper stating their position with regard to expansion of online learning in Ontario universities. The COU formed a self-directed consortium of several universities interested in collaborating on development of a university sector initiative to coordinate and promote online learning (COU, 2013a; COU, 2013b). The group began to work together under the name "Ontario Universities Online." This represented a strategic divergence from the original idea of new standalone institution toward a collaborative model that would facilitate universities voluntarily working together - without the colleges.

**Initiative announced.** Finally in December 2013, the MTCU released a memo outlining a conceptual model for a new "Ontario Online Centre of Excellence" as well as details for the first round of funding for course development and special projects (MTCU,
The model, initially posted as a leaked document on the OCUFA web site (2014), featured a portal with three hubs for course access, student support and faculty support as a joint initiative between the universities and colleges. In a press release the MTCU finally made a formal announcement of this plan, and committed 42 million dollars over three years to establish a Centre of Excellence in technology-enhanced learning to be governed and operated by Ontario’s colleges and universities (MTCU, 2014). A funding initiative featuring very short timelines for application and project development was administered by the COU for the university sector. Thus, in 2014, institutions began the work on the first round of funded course development for the new Ontario Online initiative. Over 4 million dollars was distributed to successful university sector applicants according to a program framework established by the COU (MTCU, 2013). Some of the total of the MTCU funding envelope was allocated for exploration of key issues and possible additional areas of infrastructure development. Five strategic projects on topics of cost and revenue, quality, assessment support, faculty support and portal infrastructure were commissioned by the COU to inform their planning, as confirmed in the key informant interview process.

A year later, the funding for a second round of course development and special projects was provided by the MTCU, also administered by a COU steering committee for the university sector (COU, 2014b). A landmark event occurred in October 2014 as a new Ontario Online Learning Consortium (OOLC) was legally incorporated under the Canada Not-for-Profit Corporations Act (eCampus Ontario, 2016a). All publicly assisted PSE institutions in Ontario were eligible to join and all 45 eligible colleges and universities agreed to become members.

This series of events occurring over a four-year span included periods of silence without communication from the Ministry, interspersed with rapid introduction of new
government initiatives, programs and funding incentives. At some stages the government requested feedback from the sector, while at other times stakeholders were left to speculate on developments, or plot their own course. Reconstruction of the chronological timeline of these announcements, actions and responses shows a highly dynamic period of policy dialogue, during which sensitivities to influential models and viewpoints beyond the provincial stage were considered. Figure 3 provides a visual summary of the timeline of major elearning policy and strategy events in Ontario during the period of this study.

This compressed period of policy incubation provides a unique opportunity for exploration of ruptures and continuities, as negotiation of a shared path forward for elearning strategy took place within the broader policy community in Ontario. Further contextual details are described in the following section.

Additional Contextual Factors

In addition to the influence of the broader global focus on online learning during the period of this study evident through document analysis, the key informants for Phase 1b interviews identified other factors that had a significant impact on the ongoing discussion and emergent paradigms within the policy community: fiscal austerity measures and changing leadership.

**Fiscal austerity measures.** The introduction of online learning as an important element in the MTCU strategy for transformation of post secondary education in Ontario occurred shortly after the peak of the financial crisis of 2008 had passed, as the provincial government grappled with balancing the budget and stabilizing the economy. The 2010 budget highlights expenditure management in order to eliminate the existing deficit (Government of Ontario, 2010b). While the throne speech focused on the proposed Ontario Online Institute (OOI) as a
Figure 3. Timeline of major elearning policy and strategy events in Ontario. Chronology of MTCU events and actions as well as sectoral responses are outlined in sequence.
vehicle for access to education and potential stimulation of economic growth, the 2012 MTCU discussion paper signalled that significant transformation in the PSE sector was anticipated, with a goal of cutting costs and making a specific linkage between "innovation and productivity" (MTCU, 2012, p. 6). The discussion paper foreshadowed new policy priorities by asserting "Technology-enabled learning can also promote inter-institutional collaboration, coordination and more efficient use of resources..." (p. 10). Key informants noted that anxieties were running high in the post-recession milieu given the government focus on cost-savings. For example, one commented: "We have the lowest level of per student funding in Canada. And they are looking at reducing costs more - we are already in a very constrained environment" (Key Informant 5). Another signalled that there was concern about the pace at which such changes might be implemented, noting that during the consultation process with sector stakeholders, Minister Glen Murray stated "I'm not interested in evolution, I'm interested in revolution" (Key Informant 4). The economic climate was a driver of change and had a significant initial impact on the emergent conceptualization of elearning strategy initiatives.

**Changing leadership.** A further source of anxiety confirmed through the key informant interview process was the unpredictability arising from a series of provincial leadership changes that occurred between 2010 and 2014. As noted previously, Maxim Jean-Louis of Contact North, as a special advisor to John Milloy, provincial Minister of Training Colleges and Universities had undertaken the initial phase of consultation. One of the key informants suggested that, in 2011, when Glen Murray took over leadership of the Ministry, that consultation process was "cancelled and they started again from scratch" (Key Informant 1). This shift in process is corroborated by the remarks of other interviewees (Key Informant 2, Key Informant 4, Participant D), each of whom commented on the change in strategy at the
TCU at the time that the involvement of the Special Advisor and initial contract with Contact North drew to a close. Subsequently the idea of a system-wide online learning strategy was integrated into the broader framework for transformation of the sector, as outlined in the 2012 discussion paper (MTCU, 2012). Murray’s leadership introduced an element of disruption in the ongoing negotiations between the intermediary organizations and the MTCU that one interviewee described as "a lot of confusion around the time of Glen Murray becoming the Minister" (Key Informant 2), while another noted "the only thing the ministry was really sure about was that they wanted a 'centre of excellence' of some kind. How it would work was still open. We were at square one " (Key Informant 1).

Dalton McGuinty, the self-proclaimed "Education Premier" (Trilokekar, Shanahan, Axelrod, & Wellen, 2013, p. 34) who had protected funding for the sector, resigned abruptly in the fall 2012, leaving as a legacy a funding commitment earmarked for the launch of a provincial online learning initiative, according to details gathered in the interview process (Key Informant 1). His resignation had a domino effect as Glen Murray in turn resigned in order to run for the Liberal party leadership. The leadership of the MTCU was briefly returned to John Milloy, before Brad Duguid became Minister in 2013. As a result of the revolving door of leadership the consultation process was disrupted and often delayed, leaving administrative leaders conjecturing as to the future outcome. One interviewee indicated that the uncertainty about "the ministry’s announcements, the tantalizing prospect of money... meant people were going to hold off on their own investments" (Key Informant 2). In short, in the absence of consistent strategic direction from provincial leadership, university leaders were left to chart their own course of action.

The influence of local contextual factors such as fiscal austerity measures and changing
leadership must be considered as well as the impact of the broader policyscape. In combination with a chronology of the strategy implementation, this consideration of context informs the Phase 1b detailed document analysis aiming to expose the range of emergent paradigms within the upper levels of the policy community. The vertical case study methodology anticipates that the global stage, regional differentiators and the local particularities are all incorporated in the analysis. The next three chapters include further exploration of these factors.
CHAPTER 6
FINDINGS PART 1 - NEGOTIATIONS AT THE TOP OF THE POLICY IMPLEMENTATION STAIRCASE

This chapter contains description of the findings of the Phase 1 document analysis component of the study, in which examples of government communication, white papers, discussion papers, and media releases were analyzed for symbolic models reflecting elearning strategy paradigms. As a supplement to the document analysis, additional insights shared by the key informants with regard to key contextual factors and emergent tensions between and across the levels are presented to complete the picture of the early stages of discussion and negotiation of an implementation path. Analysis of the documents and themes arising from the key informant interviews are mapped according to the ideal-typical framework described in Chapter 3. Thus Phase 1 document analysis and key informant interviews address the first two research sub-questions of this study:

1. How are dominant elearning paradigms - based on Duus' ideal types – reflected within the macro- and meso-level public messaging on strategy and policy?

2. How do those paradigmatic messages compare with viewpoints and responses to evolving elearning strategy and policy within intermediary organizations in the sector?

The document analysis was undertaken on the full collection of publicly available communications, white papers and press releases harvested through web searches, personal communication and the recommendations of the key informants. The analysis reflects the macro-level provincial government's messaging and also the corresponding responses arising among the intermediary organizations representing university stakeholder interests within the province. As outlined previously in the description of the methodology, themes are identified and mapped across the four ideal-typical paradigm models suggested by Duus (2009). One of
the paradigms, which Duus describes as a "Content-based" perspective, has been adapted to reflect a more sociological framing. This paradigm has been recast as a focus on the traditional role of the instructor role and the value of established teaching methodologies, a perspective that has shown itself to be prevalent in the Ontario university sector discussion of elearning strategies. Also, Duus' "Pedagogical" paradigm has been broadened to include conceptions of quality and evidence-based practice, in addition to initiatives undertaken primarily by educational research centres. These adjustments support use of the ideal-typical framework for analysis of elearning strategy situated in a university sector landscape in particular, and have been inductively developed based on the observed patterns within the provincial dialogue.

Common themes evident in the documents collected for this study were first categorized into the four paradigmatic areas, spanning both economic and sociological perspectives. In this chapter, the sequence of presentation of the ideal types begins with Technological- and Market-based as these paradigms dominated the initial messaging from the provincial government. Perspectives grounded in Content-focused and Pedagogical orientations follow, reflecting the dialogue threads as they unfolded. The process has exposed the initial alignments and tensions that arose between key stakeholder groups in the policy community. As noted previously, a full reference list of all public documents reviewed for this phase of analysis has been included in Appendix A. Many of these documents are also noted in the chronology outlined in the previous chapter.

Technological: Borrowing from Industrial and Business Models

Technology and productivity. Messaging that addressed the need to reduce or contain the costs of higher education in Ontario was particularly evident in communications from the MTCU. The introduction of the concept of the OOI was initially framed as a driver of
economic growth in the throne speech and budget plans of 2010 (Government of Ontario, 2010b). The MTCU-commissioned report prepared by the ministry-appointed Special Advisor first included specific references to potential cost savings as "the most efficient use of resources by measuring cost effectiveness and efficiency" and suggested that the proposed OOI could "facilitate the most effective use of scarce resources" (Jean-Louis, 2011, p. 18). Elements of this report reflected an emergent paradigm that sought to achieve efficiency and productivity gains by leveraging technological solutions. The subsequent newspaper report regarding the leaked government draft discussion paper also suggested a ministry emphasis on use of technology to improve productivity (Rushowy, 2012). As noted in the previous chapter, an MTCU paper entitled "Strengthening Ontario’s Centres of Creatively, Innovation and Knowledge" was eventually released publicly in June of 2012. This paper asserted the need to "lower rates of spending growth" and positioned online strategies as an avenue to "potential cost efficiencies" necessary to address a period of financial crisis (MTCU, 2012, p.19).

This line of discussion became a flashpoint for resistance from the university community. The tension was particularly evident in the response of the provincial faculty organization, whose representatives raised concerns related to quality and student success as a counterpoint to the goal of productivity. Reactions reflecting the instructor perspective included the assertion, "It is our strong belief that all online learning initiatives should be focused on promoting student success, not cutting costs" (OCUFA, 2013b. p. 1). Similarly, a response from OUSA asserted, "students are adamant that online learning should not be viewed by government or by institutions as a mechanism to realize cost-savings" (2010, p. 5). Others warned that online learning would not lead to increased efficiency, including the COU, who cautioned that the "MTCU should not assume that the costs of online delivery are lower than
in-person for delivery" and noted that development of innovative and effective technology-enhanced courses and programs is resource intensive (COU, 2011, p. 10).

The paradigm of technological intervention leading to increased productivity and efficiency, with cost savings as a goal, was not palatable to intermediary organizations representing stakeholder interests within the Ontario university community. However, as the community discussion evolved, the possibility of increased efficiencies through collaboration among institutions as an avenue to leveraging technological efficiencies began to emerge as potential common ground.

**Collaboration on shared technologies.** Initially mentioned in the report of the Special Advisor, the idea of coordinating technological infrastructure across Ontario universities was fairly quickly taken up by the COU in particular. In discussion papers published in early 2011, the university umbrella organization proposed that a provincial initiative could coordinate a number of activities where collaborative effort would be more efficient and effective. They proposed joint purchasing and licensing of software and hardware to support online learning and also suggested coordinated development and contracting with infrastructure providers such as Ontario Research and Innovation Optical Network (COU, 2011, p. 5).

The idea of collaboration was new to a university sector accustomed to a great deal of autonomy and a more competitive approach to acquiring resources. In 2013 the COU had proactively taken the initiative to create its own consortium among those institutions that were interested and willing to participate. The tension between collaboration and competition was acknowledged in the comments of the President and CEO of the COU at that time, who noted: "Ontario universities, which are competitive in certain areas, are working together in other ways to combine their resources effectively and efficiently in the best way possible for
students" (COU, 2013a, p. 1).

Subsequently, the objective of developing shared services and infrastructure was integrated into the MTCU strategy documents released with information on their first funding program in 2013 (MTCU, 2013). This outline of the ministry’s vision for an Ontario-wide initiative included a plan for a Centre for Excellence that would offer support to students, instructors and institutions, while decreasing costs by facilitating collaboration on tools, services and technology. The idea of productivity gains thus shifted from the technology in and of itself, to a model whereby productivity gains would be achieved through the collaborative and cooperative efforts of institutions. While the re-framing of the pan-provincial initiative as a collaborative effort gained greater traction within the broader policy community in the sector, their original paradigm of technology-based productivity through a centralized system persisted in MTCU public relations communications. For example, a much later MTCU press release regarding the new Ontario Online funding still presented the initiative as an opportunity for "minimizing duplication" in offerings and "allowing students to take the same, centralized online course" (MTCU, 2014).

**Gains through technological innovation.** The idea of broad benefits to higher education through technological innovation was a pervasive theme in the early documents analysed within this study. This viewpoint is seen in the early report of the Special Advisor who suggested: "Technology inspires innovation – when those who develop courses see what the technology is capable of (e.g., machine learning, automated translation of documents, quick integration of audio-video, rapid creation of simulation), then innovation occurs" (Jean-Louis, 2011, p. 31). The Advisor’s report also included feedback from stakeholders on the possibility of engaging with the private sector, and noted that while there was some reluctance, "many
thought that doing so would help with the task of enabling innovation" and that "such innovation would focus on the implications of emerging technology for pedagogy and for increasing student engagement and success in online learning" (p. 31). Not surprisingly, a report entitled "eLearning Industry Snapshot" prepared by an organization representing the private sector concluded that there was a significant opportunity, but a lack of government strategy to leverage the technological innovations emerging within the province (Interactive Ontario, 2011).

Subsequent references to innovation in public documents and discussion papers tended to focus on teaching and learning innovation, with an emphasis on the design of learning experiences and support for students at the course level. However, as noted above, the MTCU continued to put forward their agenda for innovation at the system level through transformative restructuring of program and access models, using technology as a catalyst for that re-structuring (OCUFA, 2014b; MTCU, 2013).

**Market-based: Economic and Access Goals**

**Economic growth.** A paradigm that promotes the importance of the provincial, national and global market influences was evident throughout the MTCU communications. Beginning with the original announcement framed within an economic development plan (Government of Ontario, 2010a), the early messaging regarding the need for response to market demands was quite pervasive. For example, the report of the Special Advisor highlighted the increasingly knowledge-based economy, the importance of improving access to higher education within the province, and the new skills and competencies that would be needed to compete in this new landscape (Jean-Louis, 2011). The MTCU discussion paper of 2012 also noted that economies were adjusting to heightened competition with a corresponding
market demand for greater levels of knowledge and skills, and affirmed that our universities contribute to the development of Ontario’s "innovation economy" (p. 4). The importance of supporting a "world-class postsecondary education system that is a leader in innovation and online learning" as part of the Ontario government’s economic plan was repeated in the MTCU press release in 2014 (p. 1). There was emphasis on the investment in new capacity in higher education, envisioned as a support to a dynamic and innovative business climate. In contrast, the intermediary organizations representing university sector interests within the province were notably silent with regard to economic benefits of elearning specifically. There is little mention of market needs, and certainly no discussion of the possibility of partnerships with private business.

Promote Ontario education as an export. The possibility of attracting out of province students into online programs is explicitly suggested in a quote from the former Minister Milloy that was included in the Special Advisor’s report (Jean-Louis, 2011):

> Ontario has a chance to be a leader. We have the technological know-how. We have outstanding institutions. We have a real interest. And, of course, because it’s online, if we can get it right here in Ontario, it also becomes exportable, where students around the world can access what’s happening in Ontario. Ontario wants to be at the forefront.

(p. 61)

This idea was reiterated elsewhere in the same report, which suggested an Ontario-based consortium could support the work of education and training providers in building a global market and encourage foreign students coming to Ontario to secure part of their programs of study before arriving in Canada (Jean-Louis, 2011, p. 9). The COU acknowledged the opportunity to market Ontario online programs outside of provincial boundaries in a press
release regarding their Ontario Universities Online initiative, noting the value of expanding online learning for students in the province and beyond (COU, 2013b). In the years that followed, as new Ontario Online Learning Consortium (OOLC) strategy unfolded, enhancement of the national and international presence of Ontario as a leader in online and technology-enabled learning was added to the mandate of the initiative (Colyar, 2015, p. 5). Thus visibility on the global stage was a recurrent theme that garnered some support.

**Flexible access for more learners.** Within both the government communication and the response from intermediary organizations, improving access to post secondary education was a consistent and important message. The Open Ontario budget paper (2010a, p. 6) set a goal reaching a 70 per cent attainment rate among Ontario’s adult population. Subsequently, in the MTCU discussion paper circulated in 2012, a more specific vision of the potential of online learning emerged, suggesting improved access particularly for those who are prevented from attending due to financial, geographic, physical, family-related, or work-related barriers. Flexibility in time and place of delivery were mentioned, as well as "revamping the vision for the Online Institute to provide Ontario students with online degree and diploma options to serve students who prefer to learn online, lifelong learners, and students with dependents who are unable to easily attend physical campuses" (p. 19). This perspective was reiterated in the conceptual model released with the Request for Proposals (RFP) details in 2013, as well as the subsequent related press release (MTCU, 2014).

Intermediary organizations found themselves able to endorse the goal of improved access. The COU’s early response to the new provincial initiative supported increased flexibility and choice of courses (2011), as well as improved access for both Aboriginal learners and those from under-represented and distant communities. A blog post on the Ontario
Confederation of University Faculty Associations site (OCUFA, 2014) also noted the particular benefit to students who live a great distance from university, or who have responsibilities that make in-class attendance difficult. OUSA’s position paper (2013) also lauded the opportunity for improved access, and the possibility of overcoming the financial, social and geographic barriers. Subsequently, this framing was reflected in the Shared Online Course Fund documentation (2014), as part of the ongoing initiative funded by the MTCU and administered by the COU. The funding program included enhancing and improving student access to a wider variety of course and program types as criteria for successful proposals. In summary, all stakeholders communicated on improved learner access to university education as an important benefit.

**Student mobility.** A related recurring theme speaks to the value of student mobility, a phrase often used as a proxy for the potential benefits of improved credit transfer processes. The MTCU was critical of sectoral progress in this area in the 2012 discussion paper, noting that Ontario’s credit transfer capacity continued to lag behind comparable jurisdictions, and that student mobility remained a challenge for the province. An early scholarly white paper shared on the COU web site argued that the postsecondary education system in Ontario was not designed to facilitate mobility between institutions, although universities should be permitted to "offer and design a comprehensive palette of online courses, which are then centrally shared" (Garcia & Albert, 2011, p. 8). OCUFA’s Policy Statement on Differentiation (2014) asserted that existing governance processes should be upheld, with credit transfer for online or blended learning programs intended to provide credit for students across institutions only being possible with appropriate review and oversight. Thus both COU and OCUFA materials emphasized the value of institutional differentiation and the need for continuity of existing
processes for academic program governance.

The COU response to the early MTCU discussion paper recognized the possible role of a provincial consortium in maintaining a database of course equivalencies for online courses between participating institutions and supporting related processes (2012). This direction aligned with the MTCU goal of improving credit transfer within the province, and was also endorsed by OUSA representatives, who proposed that the main aim should be to increase the freedom of students to study online by allowing for greater transferability of credits (2013). Both COU and OUSA continued to message consistently along these lines, supporting the MTCU initiative, albeit each with their own caveats. The COU championed differentiation as a key value that should take precedence, while OUSA promoted appropriate student support and quality of online courses as critical success factors.

In the Ministry's communication, a more revolutionary stance on the operationalization of credit transfer can be observed, particularly the linkage to increased efficiency. For example, the early MTCU discussion paper suggested that in addition to decreasing costs, effective credit transfer could contribute to the efficiency of the post-secondary system overall (MTCU, 2012). This viewpoint was reiterated in their conceptual model and funding criteria associated with the 2013 course development RFP documentation and also the MTCU's 2014 press release, which opened with the statement that the new Ontario initiative would "give students across the province one window of access to high-quality, transferable online courses, while reducing course duplication" (p. 1). Depending on the stakeholder viewpoint, student mobility was seen either as an opportunity for an improved student experience and more efficient system, or as a threat to differentiated programs across institutions. Opinions differed considerably in terms of expectations for transformation of the current system.
Content-based: Instructor Driven

Content transmission. Echoes of past correspondence models of distance education are evident in the conceptualization of online courses as packaged digital course content. Within the documents analyzed in this study, there was some evidence of elearning being seen as electronic transmission of traditional lecture content. For example, the Open Ontario throne speech that announced the creation the new Ontario Online Institute asserted that the initiative would "bring the best professors from Ontario’s postsecondary institutions into the homes of those who want to pursue higher learning" (Government of Ontario, 2010b). The MTCU discussion paper also describes changes allowing course content to be increasingly delivered online and a focus on instructor expertise such that students can have access "top teaching talent" from around the world (2012, p. 10).

However, there are also references to the importance of a shift in focus toward ensuring a rich and interactive student learning experience. The scholarly white paper published by the COU cautioned that distance education is too often thought of as the past mode of delivery relying on self-study units and print material, and noted that online or distance learning is not the same as "taking a correspondence course" (Garcia & Albert, 2011, p. 1). Similarly, OUSA (2013) warned that online education is much more than simply taking the materials used to teach students in-person and uploading that material on the internet. MTCU discussion also acknowledged that technology not only accelerates access to data, but also enables "new ways for students to learn from and interact with faculty and each other" (2012, p. 10). In promoting a move beyond the transmission model, the MTCU envisioned opportunities for faculty in traditional institutions to engage in "direct dialogue and mentorship with students" (p. 10). This suggested a more current conception of online course design, in closer alignment with
recognized good practice in the field. The shift toward closer alignment and agreement on this topic is reflected in public-facing messaging across all stakeholder groups.

**Autonomy.** However, a tension may be observed between the MTCU-stated goal of reducing duplication through sharing of courses or digital content and the desire among instructors, and their universities, to maintain their autonomy. Posts on the OCUFA web site (2014b; 2014c) were very specific in advocating for a model that allows universities and faculty members to retain control of their own courses and preserve academic freedom. A reference to online learning in OCUFA's "Policy Statement on Differentiation" noted the importance of protecting the intellectual property rights and working conditions of faculty who develop and deliver these courses (2014a). The scholarly white paper posted on the COU web site candidly noted that a consortium model may prove difficult as "professors are accustomed to designing their own courses with little, if any, outside interference" and recommended a collaborative approach (Garcia & Albert, 2011, p. 6).

The COU situated this concern at the level of institutional responsibility in their early response to the provincial OOI proposal, firmly asserting that responsibility of the universities to "guide the content development and quality assurance of courses and programs leading to the granting of academic credentials" (2011, p. 2). The COU viewpoint that a provincial consortium should not have any academic functions including "delivering content, advising students, quality assurance, and/or granting any credential" (2011, p. 8) was adopted in the subsequent MTCU conceptual model (2013), which specifically made provision for institutional autonomy over course content and offerings. The COU (2011) and OCUFA (2014) have both emphasized differentiation as an important principle. However, as mentioned above, the MTCU vision of common curriculum and course design resurfaced in the public messaging
of the provincial government in the form of a press release that continued to promote a vision of a new program that would minimize duplication by allowing students to take the same, large, centralized online course (MTCU, 2014). This variance in conceptualization of the aims of the new OOLC initiative reflects divergent perspectives on this point.

**Pedagogical: Effective Design**

**Quality.** All key informants emphasized the importance of quality in online programming as a priority. This was evident in the initial response of the COU to the idea of an Ontario Online Institute (OOI), and continued in several discussion papers and press releases. The COU asserted that professors were already using technology to improve students' learning experiences and learning outcomes, and that many instructors engage in innovative approaches that realize the "developing potential of emerging technology to improve teaching and learning" (COU, 2013a). The student lobby group also espoused quality as the most important aspect of a provincial initiative (OUSA, 2013), while the faculty perspective reflected in materials on the OCUFA web site (2013a, 2014b) focused on the need for implementation strategies and sufficient resourcing to ensure accepted standards for quality assurance would be met. A paradigm in which effective pedagogy is prioritized was palatable amongst all stakeholders within the policy community, and thus not surprisingly became a common thread in public communication.

All agreed on the importance of quality, yet it became a topic of considerable discussion, perhaps in response to what the Special Advisor to the MTCU reported as a perception in some quarters that online learning represents an “underclass” (Jean-Louis, 2011, p. 31). There was an element of resistance to online learning by some groups in the academic community, including student advocates, who early on expressed concern that the "quality of
education may be lower than what is found in a traditional university setting" (OUS, 2010, p. 4). A persisting theme suggesting that in-class teaching is the standard to which online should be compared is reflected in the OUSA white paper assertion that "online learning offered by Ontario universities must facilitate learning outcomes comparable to in-person classroom education" (OUS, 2013, p. 27). While the university leaders affirmed the quality of online learning, the perception outside the sector was a concern, particularly for the provincial government in relation to accountability for funds invested in the OOI project. In an MTCU discussion paper, quality was firmly linked to economic considerations in the statement: "Increasingly diverse and mobile learners are expecting ever-increasingly high quality in return for what they pay; and the broader public is looking for concrete results from the investment of scarce public resources" (MTCU, 2012, p. 4). Responses to a demand for pedagogical quality thus ranged from proposed new resourcing to support faculty development, through to accountability for a concrete return on investment.

**Faculty support.** Many of the documents analyzed included suggestions for faculty support initiatives to promote development of high quality, engaging courses. The student perspective particularly emphasized the need to assist faculty in implementing new methods, and reflected concern regarding the transition from classroom teaching to online environments. Both the MTCU and the COU supported the idea of sharing effective practices regarding development of online courses and programs, online pedagogy, and the utilization of technology-enabled approaches (COU, 2011; MTCU, 2014). While acknowledging the considerable existing capacity within the province, at the same time documents frequently proposed the need for resourcing and support in this area.

**Measuring quality.** There are further differing opinions as to appropriate measures for
accountability and monitoring of the quality of online courses. The COU (2011a) affirmed the autonomy of institutions, taking the position that a provincial consortium should not establish standards, but rather that existing quality assurance processes were the appropriate mechanism. The student voice, however, expressed considerable concern about the quality of online courses, and proposed that courses offered through the new OOLC be "subject to a robust quality assurance framework specific to online learning" (OUSA, 2013, p. 25). A reference to the Postsecondary Education Quality Assessment Board guidelines for online courses was offered as an example. The MTCU’s description of the new centre included in the 2013 RFP documentation indicated that a central hub "could develop and monitor standards for the delivery of shared courses" based on existing best practices. It was also envisioned that it would also address the pedagogy used in course delivery, though not the academic content of the course (p. 2). While all three of these stakeholder groups were committed to ensuring and monitoring quality, varied points of view were expressed as to how this can best be achieved.

**Pedagogical innovation.** As noted previously, innovation was foregrounded in many documents as an important element and a driver of change. This idea was espoused in the materials generated by both intermediary organizations and the ministry with references such as "best practices for innovative online pedagogy and delivery mechanisms" (COU, 2011, p. 5); becoming "the leading hub for online learning innovation" (Jean-Louis, 2011, p. 142); and using the "best technology available to find innovative ways to improve how universities teach and how students learn, and in that way we will get even better results" (COU, 2013a, p. 1). Both the COU and OUSA suggested that the mandate of the proposed OOI should include a link to research on improving online learning (OUSA 2010; COU, 2012). The public relations material from the MTCU promoted Ontario’s "world-class postsecondary education system" as
a "leader in innovation and online learning" (MTCU, 2014, p. 1). The idea of innovation is mentioned more than 278 times within the documents analyzed in this study.

Innovation is seen as both a driver and an outcome of development in this field. However, as the discourse regarding a provincial online consortium evolved, it became more closely linked to pedagogical design, rather than to technological development and creation of new applications and products. Promotion of improved learning experience was a goal espoused by all stakeholders. While the intermediary groups such as COU and OUSA focused firmly on innovative pedagogy in relationship to effective teaching and improvement of the student experience, the MTCU added a further dimension, again linked back to economic drivers. Their comprehensive discussion paper regarding the transformation of the sector in Ontario promoted an "innovation-focused approach" and suggested new initiatives could introduce cost savings while maintaining quality of program (2012, p. 9).

**Summary of Document Analysis using Ideal-Typical Framework**

As demonstrated through this detailed document analysis, considerable variation on perspectives and priorities is evident in the public-facing messaging during the period of this study. The directives of the provincial government regarding their emergent online learning strategy and the response of key intermediary organizations during a period of consultation and negotiation show evidence of intersection at some points, and divergence at others. The four groupings and sub-theme areas are shown mapped within the ideal-type framework in Figure 4. The divergence of paradigmatic models is not surprising, given these representatives are located at different levels of the policy implementation staircase and are responsible for fulfilling their administrative mandate by acting in the interest of their constituents. These constituents range from the taxpayers of Ontario, to institutional leaders, to the instructors who
teach the courses, and the students who are enrolled in university degree programs.

Figure 4. Distribution of sub-themes identified in Phase 1 document analysis. Themes are distributed across market-based, pedagogical, technological and content-focused paradigms.

Interpretation and Negotiation: Tensions in the Policy Community

In order to understand the policy processes at work within the province, this study also considers sources of influence that promote the particular paradigmatic values and create a sense of urgency for strategy implementation. While analysis of public documents supports mapping of the espoused perspectives of various stakeholder groups within the Ontario University sector, observations shared by participants during the Phase 1 interview process provides further insight as to how the broader policyscape influenced these perspectives. This
section describes key influential models identified by interviewees. This is followed by a
description of other key contextual factors that they reported as being central to the discussion
and development of a provincial framework, although not evident in the documents collected.
As tensions and issues were being discussed and negotiated over several years, the key themes
and messaging continued to shift as conceptions of symbolic models evolved during this period
accelerated strategy development. I conclude the chapter with a representation of the evolution
of the paradigmatic mapping of themes across the meta- and meso-layers of the policy
community over of the time period addressed by this study.

Sources of influence. As noted previously, Stromquist’s concept of the policyscape can
be described as a constellation of policy prescriptions legitimized through institutional emitters
that advance and reinforce conceptions of success within the community. She further explains
these influential paradigms as “symbolic models of what is suitable for contemporary society”
and notes that the unit of analysis is “not the country or the institution, but rather the set of
dimensions that comprises a particular policyscape” (2013, p. 223). In the following section,
three dimensions of the elearning strategy policyscape will be explored: potential borrowing of
models from other jurisdictions; the influence of Contact north; and impact of the MOOC
phenomenon on policy instruments developed by the MTCU. These influential emitters have
reached across global and local contexts to influence paradigmatic developments within the
province.

Models from other jurisdictions. Education systems that have succeeded in systemic
integrations of online learning provided examples that were considered during the early stages
of discussion, particularly as the MTCU looked for potential efficiencies and cost-savings.
Consortia considered as possible models included the Open University Australia (OUA),
BCcampus and eLearn Alberta (Key Informant 1, Key Informant 3). Both the MTCU and OUSA were seen to be particularly influenced by the Australian consortium. While limited to restricted institutional membership, it was attractive in the fact that the consortium has been self-sustaining and revenue generating (Key Informant 1; Key Informant 4). A key feature noted was the seamless student experience in both registering and transferring credits. BCcampus and eLearn Alberta were mentioned as existing models of resource sharing and credit transfer mechanisms created by their respective provincial ministries. Notably, the Open University in the United Kingdom was not noted. The idea of developing re-usable and sharable Open Educational Resources (OERs) rather than shared online courses was of particular interest to the university sector (Key Informant 2).

A model seen locally within the Ontario college sector was an especially significant factor in development of MTCU paradigms regarding efficiency and productivity, with a shared common registration process, single learning management system, and seamless credit transfer for a non-duplicated set of common courses is available to any student in the college system (Key Informant 1). While the student association favoured the access and flexibility provided, the COU felt that use of the college shared course model was not appropriate, nor feasible for the more differentiated university sector (Key Informant 2). A subsequent report commissioned by the COU (using MTCU funding) surveyed existing models nationally and internationally, concluding "Despite the diversity of consortia models, we did not see one particular consortia that we believed would be a suitable, “off-the-shelf” solution for the OOI, given the unique characteristics of Ontario’s universities (Hampson, 2014, p. 46)."

Regardless, these many examples of consortia models acted as "emitters" influencing the MTCU paradigms for transformative change. An early signal in the report of the Special
Advisor noted

... Ontario can't rest on its laurels. We must lead on quality and effectiveness. We must stay ahead of the curve to make sure that we remain number one now and into the future. We won't cede our place at the top to others. (Jean-Louis, 2011, p. 8)

In an interview following the leak of the early draft of a MTCU discussion paper that proposed substantial increases to the online learning capacity in the province (Rushowy, 2012), Minister Glen Murray signalled the importance of global emitters through his comment that "the report is a look at trends around the world and presents possible areas for change" (para. 8). The subsequent discussion paper (MTCU, 2012) affirmed that "It is the government's intention to generate responses to this paper that recognize global trends in PSE in addition to addressing the local priorities of acceleration, productivity, technology, quality, and student choice"(p. 7).

Interestingly, while the government's interest in global trends was foregrounded, one interviewee signalled that while sense of need to "catch up" with other jurisdictions might have been an overarching aim of MTCU, it was less important for the universities (Key Informant 2). This final point is confirmed by Hampson’s concluding remarks in his 2014 report commissioned by the COU, as he observed that there were few incentives for participation in collaborative models for the Ontario university sector.

**Role of Contact North.** Following the early appointment of the Executive Director of Contact North as a Special Advisor to Minister Milloy, this arm's length organization presented itself as both a stakeholder and an existing model demonstrating consortia benefits across the university and college sectors. Jean-Louis was initially seconded as a Special Advisor to facilitate initial needs analysis, and the Contact North organization subsequently were engaged in an early contract to develop their existing database into an enhanced provincial portal (Key
Informant 4). Given its experience in providing provincial infrastructure including a provincial online learning website and a network of community access centres, Contact North served as an important emitter for the MTCU (Key Informant 2) and for the universities in the North (Key Informant 1). Yet it was observed that "one of the reasons Minister Murray put the kibosh on the previous plans were tensions between universities and Contact North. The ones in the north have a much better relationship" (Key Informant 1). This tension is also reflected in the comments of another interviewee who stated "this [initiative] needed to be owned and operated by the universities and colleges, and Contact North was not that" (Key Informant 2). This individual further observed that

... we have never really recovered from that in the sense that there is still a very uncomfortable relationship in the sector between what we are trying to do and what Contact North is trying to do. And the Ministry, at every turn, by not addressing the conflict directly has exacerbated it. (Key Informant 2)

Finally, the same interviewee summarized that "Due to conflict of interest, Contact North relationship has been awkward and their influence muted." The tensions described by the key informants reflect another divergence in paradigm, wherein the MTCU perceived Contact North as an agency that would unite various duplicate services and improve efficiency through technological means, while the university leaders represented by the COU, particularly in the south of the province, saw the voice of Contact North as a threat to their institutional autonomy and differentiation from the college sector (Key Informant 2, Key Informant 4).

MOOCs. As described in Chapter 3, beginning in 2011 and peaking in 2012, the MOOC phenomenon was also an important influence on the academic community within the broader policyscape (Siemens, 2015, p. xiii). Mainstream media across the globe reflected a
groundswell of interest, with New York Times describing 2012 as the Year of the MOOC (Pappano, 2012) and Canadian newspapers following the story as well (Contact North, 2013b). Among the more tantalizing aspects for educational policymakers was the possibility that, through technology-supported scalability, there would be opportunities to both cut costs and improve access. During much of the period that is the focus of this study the narrative "was overwhelmingly favourable to these notions of dramatic and substantial change" (Siemens, 2015 p. xiv). The Ontario university sector was not immune to the influence of this much publicized and much debated online learning model.

Key informants representing four different intermediary organizations commented on the influence of MOOCs on the MTCU strategy development process. One noted that students could be advocates of the MTCU’s interest in scaling up online learning as they are not concerned about the idea of large scale enrolment given they are already accustomed to it in large face-to-face classes. It was expressed that the focus should rather have been on the ability to get the credit, "provided the quality is there" (Key Informant 1). However, the prioritizing of development of high enrolment, sector-wide introductory courses in the 2013 RPF funding structure soon became a flashpoint for controversy. Other interviewee comments included "I can't tell you how many times I had to explain to them that this is just not any idea that would work in any way." (Key Informant 2) and "One of the guys at the Ministry made claims about how they could be valuable, but (these were) ill-informed and sweeping generalizations" (Key Informant 3). It was also suggested that forcing students into high enrolment MOOC-like courses would create a two-tier system, with a "negative impact" on quality for the online learners (Key Informant 4). In terms of the potential impact of the broader policyscape on regional adoption of global trends, the timing of the peak of the MOOC hype cycle coincided
with the period in which Minister Murray was developing ideas for the 2012 discussion paper. The situation is well summarized in an interviewee comment that "This was when the medium of MOOCs was at its height. And his conception as well, was that MOOCs are developing, and universities are going to be supplanted if we don't get on the same page as what’s happening" (Key Informant 4). Many elite universities such as Harvard, MIT and Stanford were legitimizing the model by partnering with MOOC providers and investing in MOOC development as an institutional strategy (Coursera, 2013; EdX, 2013). Within this vertical case study it is perhaps the most striking example of an influential global trend, with high profile emitters promoting adoption.

**Summary.** These three dominant strands of influence were all significant within the policyscape: potential borrowing of models from other jurisdictions; the influence of Contact North; and impact of the MOOC phenomenon on policy instruments developed by the MTCU. These emitters were significant in their promotion of productivity, scalability and efficiency as broad goals for transformation within the sector. From these broad value sets, a range of symbolic models emerged, which can be grouped according to Duus' four paradigmatic ideal types. The attention given to these symbolic models and strategies varied across stakeholder groups and the interpretation of those models also shifted and evolved during the course of the four years which are the focus of this study. However, there are a number of high-level strategies and models that persisted in the upper levels of the policy development process. Technology-based models aiming to increase efficiency focused on the disruptive aspects of online learning and the potential to offer larger courses across institutions to avoid duplication. Linkages to market-based strategies included neo-liberal elements such as competition between Ontario universities for students and resources, and also coordinated promotion beyond
provincial boundaries. Those espousing a pedagogical paradigm placed emphasis on quality of programs, the need for faculty support and potential gains through innovative instructional strategies. Finally, there were stakeholder groups that focused on issues related to content reuse, on one hand those promoting open sharing, and on the other hand those advocating for differentiation between institutions and protection of academic program oversight. A summary of these models and strategies is outlined in Table 4.

Table 4
*Categorization of symbolic models and strategies according to Duus' four ideal types*

<table>
<thead>
<tr>
<th>Paradigm</th>
<th>Persisting Model/Strategy</th>
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| 1. Technology-based Paradigm | • Industrial models to increase efficiency  
|                     | • Large class scalability                                                                 |
|                     | • Technology as "disrupter"                                                              |
| 2. Market-Based Paradigm   | • A neo-liberal market leveraging a provincial portal service                            |
|                     | • Competition within the sector for recruitment of Ontario’s online learners              |
|                     | • Consortial collaboration to promote the province on the global stage and improve student access/mobility |
| 3. Pedagogical Paradigm    | • Focus on quality of online course offerings                                            |
|                     | • Differentiation through pedagogical innovation                                          |
|                     | • Need for faculty support                                                                |
| 4. Content-Based Paradigm | • Diversification of scope of online learning to include Open Educational Resource (OER) objects |
|                     | • Academic oversight and authority resides with universities                              |
|                     | • Differentiation between universities and college sectors                                |
**Tensions and implementation issues.** In addition to noting recurring themes, overarching contextual factors and influential emitters from the broader policy landscape, key informants were vocal in identifying specific points of tension in the broader policy community. These issues are worth noting as factors influencing what Kingdon would describe as the framing of the policy problems (1984, p. 17). During the key informant interviews for Phase 1, several other aspects of the process were identified as sources of tension between the upper steps on the policy implementation staircase. As noted above, the MTCU policy and strategy instruments, as well as public relations messaging consistently promoted models situated in the technological and market-based paradigms to improve productivity and efficiency throughout the period of this study. However, representatives of intermediary organizations described active resistance. What follows are samples of participants' responses:

- "The Ministry had that rhetoric but I applied my standard Ministry rhetoric translator to that. They [Catching up and the Knowledge Economy] were not drivers for us" (Key Informant 2).

- "A lot of the stakeholders were very wary of what Glen Murray was proposing... the government registered this and wanted a success story as well. And they were getting all this resistance" (Key Informant 4).

- "You see that people aren't really on the same page... There's some tension between what the Ministry says, and what others are saying and concerned about" (Key Informant 3).

A particularly thorny topic was the early mismanagement of the online learning strategy development on the part of MTCU, which was seen by all stakeholders to have had serious negative impact on progress in this area and jeopardized the ministry’s credibility.
Issues identified by the key informants included a lack of clear leadership vision from the MTCU (Key Informant 2) and poor management leading to lack of communication, delays and issues with fiscal deadlines (Key Informant 1). Further, it was observed that the operational outcomes of policy and strategy decisions had not been properly considered (Key Informant 3) and that there was an apparent lack of awareness of administrative constraints on the part of MTCU leadership (Key Informant 4). Finally the framing of online learning as the panacea to the difficulties in the system without seeing the challenging realities of student experience and faculty role was seen to be highly problematic (Key Informant 4).

A frustrating aspect of the MTCU strategy development was the compression of the timelines for the roll out of a funding program when it was finally announced late in 2013. This was explained by an interviewee with insight into the MTCU process as a situation in which the "Government had difficulty with having to spend money in a given time period with funds originally earmarked for Murray’s initiative - but ended up spending without sufficient planning due to unrealistic timelines to spend with the fiscal year" (Key Informant 1). University administrators were motivated to act within the short timelines given there was over 4 million dollars in funding incentivizing participation in the new provincial initiative. Course development funding then flowed for two years before a provincial consortium with a web-based service portal was actually established (MTCU, 2013; COU, 2014), and during this time there was no clear vision of a consortium framework.

Initially the evaluation rubric for the review of the proposed projects focused on quality, scalability, and existing capacity of the institution to complete the deliverables (MTCU, 2013). In the second year, options to develop online courses to improve sustainability of low enrolment courses or facilitate the development of fully online degree programs were
added. Also, a new proposal category supporting creation of sets of re-usable learning modules was introduced, and in this context a renewed emphasis on collaboration (Council of Ontario Universities, 2014b). To avoid perceptions of bias in the evaluation process, all of the proposals were reviewed by external experts from outside the province for the first three rounds, which was a unique feature of the program. In order to accommodate the budget cycle within the Ministry as mentioned above, very short RFP cycles were introduced.

These short program cycles were seen to have a negative impact on institutions’ strategic responses as the constraints of delivering within a given fiscal year "hugely impacts on what an institution can do and issues around quality" (Key Informant 3). Based on the interviewee's comments, it may be inferred that these issues compromised credibility of the MTCU. Their espoused aim of efficiency and high quality results was inconsistent with an enacted theory-in-use that presented unrealistically short planning timelines and unclear goals for a significant funding program implementation.

**Summary of Phase 1 Analysis**

A final observation from one of the key informants, after reviewing the summary of the document analysis confirmed the research methodology used in this study. The interviewee was complementary about the rigour of the analytical approach, but noted that the presentation of the themes and ideas according to paradigmatic framework was "far more reflective and organized than the reality they reflect" (Key Informant 2). While the ideal types provide a structured heuristic for analysis, the swirl of policy process is more iterative and reactive. The key informant explained

We were motivated most deeply by trying to realize value for the university sector and for students in a consortial approach, in a context where the Ministry might make
investments. We were casting around for various things. I would say we moved more inductively. (Key Informant 2)

This comment emphasizes a dimension of policy process that is exploratory and dynamic, with each stakeholder group advocating for a framing that could be supported by their constituents, while also, ideally, leading to benefits recognized by the provincial government and the public.

Given the rapid changes in the leadership of the MTCU and the intermittent consultation periods, there were many opportunities to negotiate and influence the policy direction being taken. Advocates from the Ontario University Student Association (OUSA) aimed at a strategic alliance with the MTCU, seeing a shared concern for the student benefits as form of public interest. The COU sought value added benefits that would resonate with university leaders operating within a competitive environment. The Ontario University Council on eLearning (OUCeL) provided input on operational issues and practical aspects of the RFP process. The Ontario Council of University Faculty Associations (OCUFA) advocated for strategies that would be acceptable to faculty members whose buy-in would be essential to expansion of online program offerings.

Rather than simply describing these agencies as being at cross-purposes with one another, the ideal-typical analysis of the underpinnings of the various perspectives was applied to further illuminate the nuances of the policy implementation process. Figures 5 and 6 together show a sequenced mapping of the themes introduced through the document analysis process and key informant interviews, positioned across the economic and sociological orientations of Duus' multi-axis model. In Figure 5, early themes advanced by the provincial government and the intermediary organizations are coded with shading to differentiate between policy ideas advanced by each level.
Figure 5. Mapping of early themes advanced by MTCU and by intermediary organizations.

This comparison of thematic patterns reflects the early stages of policy discussions.

In comparison, Figure 6 represents the evolution toward the end of the period of the study. The dominant paradigms and symbolic models evident in discussion of a provincial online learning slowly shifted over the course of several leadership changes, consultation processes and funding program negotiations. The ideal-typical framework serves as a yardstick for consideration of both changing paradigms and persistent tensions. Overall, the province and the intermediary organizations moved into closer alignment, as can be seen through comparison of Figures 5 and 6. Some of the proposed models that were farthest from shared
Figure 6. Mapping showing progressive convergence of symbolic models and themes.

This analysis reflects themes advanced by the MTCU and intermediary organizations at a later stage in policy discussion.

interests of the intermediary organizations were softened, and new value propositions for improving the quality of university sector programming were introduced.

In conclusion, the document analysis and key informant interviews revealed a highly dynamic landscape during this period of elearning strategy development within the province. There was both a sense of urgency that a framework be established, and a need for more
discussion and consultation to arrive at an approach that would be acceptable to all stakeholders. The broader policyscape provided important emitters that influenced strategic direction, and there are signs of pressure towards isomorphic adoption of models from other jurisdictions. Although there was evidence of extreme divergence of viewpoint on purposes and goals of elearning strategy at the beginning of the period studied, this shifted somewhat toward increased paradigmatic alignment. As consultation, negotiation and strategy implementation unfolded, the stakeholders continually negotiated their shared purposes and intentions in an exploratory and dynamic inductive process.
CHAPTER 7
FINDINGS PART 2: THE INSTITUTIONAL VIEW

This chapter contains a description of the impact and dynamic of the provincial policy process development at the institutional level through analysis of the strategic responses across the publicly supported universities within the province. In the first section, I provide analysis of collected Multi-Year Accountability Agreement (MYAA) reports describing the existing capacity and growth in online course delivery based on these publicly published institutional documents recording online learning activity levels. Next, SMAs and institutional strategic responses, task force reports and recommendations to governing bodies with regard to online learning goals and capacity development directives are analyzed. In the final section, the outcomes of this document analysis are compared with key themes identified in Phase 1 to identify commonalities and variations between steps on the policy implementation staircase. In this chapter I will thus explore the findings with regard to the third research sub-question:

3. How are Ontario universities navigating provincial messaging on elearning, global influences and internal pressures, as reflected in their strategic responses?

In this phase, particular attention is paid to institutional ability to respond to provincial messaging on elearning, global influences, and internal pressures - as reflected in government reports and the universities' communicated strategic responses.

By the Numbers: Growing Beyond the Capacity Baseline

As noted in the previous chapter, the academic leaders at universities across the province faced a dynamic post secondary landscape in which the elearning policymaking in particular was garnering attention on the global stage. At the same time, presidents and provosts were able to follow, and potentially influence, the provincial developments introduced
by MTCU through participation in COU consultation and advisory committee processes (Lawson, 2014). Evidence of continued growth of adoption in other jurisdictions and the increased focus on provincial online learning initiatives catalyzed Ontario’s university leaders to increasingly consider the challenges and potential benefits of elearning initiatives and consortia (Bates, 2014a). Many institutions had already made substantial investments, as is evident in the government reports and documents from the period collected.

Several sources of public data are available which together can create a picture of the online-learning capacity growth across Ontario universities during the period of this study. These include a 2010 survey of online learning activity in Ontario and MYAA reports posted annually by universities. Together these data sources can be used to describe the evolving capacity within Ontario, compare growth with that reported in the USA, and also to compare levels of activity between universities within the province.

**MTCU quantitative reports.** A quantitative survey of online activities at all universities and colleges undertaken by the provincial government in 2010 showed that of those providing data, 14 universities had specific elearning plans, and 18 included elearning as part of their overall institutional strategic plans (MTCU, 2011, p. 2). This survey also provided an early snapshot of capacity based on the number of elearning courses in proportion to total number of courses offered. Given the difficulty in defining, mining and aggregating data across institutions, the authors of the report included the caveat that the data provided could be considered "best estimates of activity levels if reporting systems were not capable of identifying and reporting on elearning activity levels separately from other activity" (p. 3). Some irregularities are thus evident in terms of consistency of the data provided. The 2010 survey results as published note Ontario colleges reported 7% of enrolments were in online
courses while universities survey results showed between 7% and 13% across undergraduate and graduate. Subsequent MYAA reports suggest that the 13% range appears to be an over-estimate.

A possible point of comparison is data presented in the annual online education reports published by the USA-based Babson Research group in collaboration with Sloan Foundation. For over ten years, they have sent their survey to the Chief Administrative Officer at thousands of USA higher education institutions to gather information on trends in online learning and the attitudes of these senior administrators. The Babson survey uses the same definition of an online course as the MTCU (more than 80% of course content is delivered online), but the target population differs given private institutions and two-year colleges are included. The Babson US report of the same year as the provincial survey (Allen & Seaman, 2010, p. 8) states that 29.3% of total enrolments were in online courses across all institutional types. Even allowing for the variations in reporting by Ontario universities in the MTCU survey, overall Ontario appears to have been trailing US trends. In the absence of other reliable data for the period, some sense of the higher level of adoption in the USA can be inferred.

**MYAA data.** As noted above, all universities in Ontario submitted MYAA reports annually during the period of the study. The reports required institutions to share quantitative data on elearning activity, thus providing a source of longitudinal data over several years. An example showing the section of the MYAA report template related to elearning is provided in Appendix H. Below, in Figure 7, a graph of the distribution of total online course enrolments in Ontario universities between 2011 and 2013 shows the number of registrations per year ranging from as low as zero to as high as 38,000 for a single institution.
Figure 7. Ontario university online course enrolment. This chart presents total online course registration between universities over a three-year period, based on MYAA reports.

While presentation of absolute numbers provides a sense of capacity that existed within the province prior to introduction of the provincial eLearning initiatives, it is also valuable to consider the evidence of growth as a metric signalling the level of acceptance that online learning strategies were gaining during this period. The speed at which individual institutions were expanding their online learning offerings varies significantly across the province. In order to compare growth between institutions, their total online course registrations are shown again in Table 5, with universities ordered from lowest to highest enrolment growth during the period, based on percentage increase.
A recent issue of the Babson Research Group annual report (Allen & Seaman, 2015) provided similar data analysis highlighting growth in online learning enrolments in four-year public institutions in the USA, which increased 7.2% between 2012 to 2014. It is possible to

<table>
<thead>
<tr>
<th>Ontario university online course enrolment increases based on MYAA reports for graduate and undergraduate programs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online Course Enrolments</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>2011</strong></td>
</tr>
<tr>
<td>Algoma</td>
</tr>
<tr>
<td>Windsor</td>
</tr>
<tr>
<td>NOSM(^b)</td>
</tr>
<tr>
<td>Laurentian</td>
</tr>
<tr>
<td>Guelph</td>
</tr>
<tr>
<td>Ryerson</td>
</tr>
<tr>
<td>Wilfred Laurier</td>
</tr>
<tr>
<td>Western</td>
</tr>
<tr>
<td>Waterloo</td>
</tr>
<tr>
<td>Lakehead</td>
</tr>
<tr>
<td>Queen's</td>
</tr>
<tr>
<td>York</td>
</tr>
<tr>
<td>Nipissing</td>
</tr>
<tr>
<td>Carleton</td>
</tr>
<tr>
<td>Ottawa</td>
</tr>
<tr>
<td>Trent</td>
</tr>
<tr>
<td>Brock</td>
</tr>
<tr>
<td>UOIT</td>
</tr>
<tr>
<td>OCADU</td>
</tr>
<tr>
<td>Toronto</td>
</tr>
<tr>
<td>McMaster</td>
</tr>
</tbody>
</table>

\(^a\) Percentage increase from 2011 to 2013 is presented in this column.

\(^b\) It should be noted that while the Northern Ontario School of Medicine (NOSM) uses telepresence extensively, it does not report this as online learning.
arrive a similar metric for Ontario public universities by aggregating these institutionally reported data to determine the average yearly increase in online course enrolments for the same period. Results shown in Table 6 indicate that enrolment increases of 14.4% and 11.9% in 2012 and 2013 respectively, suggesting a more rapid rate of growth than the 7.2% for public four-year institutions noted in Allen and Seaman's US report for the same time period.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total enrolments</th>
<th>Increase in enrolments</th>
<th>% Annual Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>170985</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>195619</td>
<td>24634</td>
<td>14.41%</td>
</tr>
<tr>
<td>2013</td>
<td>218844</td>
<td>23225</td>
<td>11.87%</td>
</tr>
</tbody>
</table>

Another source of information is a recent national report researched by Educonsillium (2015) for Global Affairs Canada. This report presented survey data indicating that each responding Ontario university, on average, offered 123 online courses across undergraduate and graduate programs (p. 23) with 6908 students registered in those courses (p. 28). The historic percentage growth and breakdown by institution were not part of the findings presented. Unfortunately, as this was a voluntary survey, the results are incomplete. Notably, two institutions that did not participate but have a strong record of activity in this domain are the University of Waterloo and Western University (p. 15).

Another metric for evaluating growth in capacity for delivering online learning is the growth in the number of courses offered. When surveyed about anticipated expansion, the participants responding to the Educoncellium survey indicated an average planned growth of 13.72 courses per Ontario institution for the coming year (p. 27). While estimates of projected
growth from this sample are of interest, we have the possibility of using MYAA reports to aggregate a complete set of historical data. As noted previously, all Ontario institutions were required to report and publish this information annually during the period of this study. MYAA data can be used to calculate the rate of growth in terms of the number of course offerings within the province, using the data shown in Table 7. Institutions are listed in order from lowest to highest percentage increases in number of courses offered.

Table 7

*Ontario universities increases in online courses offerings based on MYAA reports*

<table>
<thead>
<tr>
<th>Online Course Offerings</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Percentage Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western</td>
<td>381</td>
<td>309</td>
<td>306</td>
<td>-25%</td>
</tr>
<tr>
<td>Lakehead</td>
<td>221</td>
<td>210</td>
<td>199</td>
<td>-11%</td>
</tr>
<tr>
<td>NOSM</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Queen's</td>
<td>115</td>
<td>125</td>
<td>115</td>
<td>0%</td>
</tr>
<tr>
<td>WLU</td>
<td>89</td>
<td>93</td>
<td>93</td>
<td>4%</td>
</tr>
<tr>
<td>Guelph</td>
<td>223</td>
<td>245</td>
<td>234</td>
<td>5%</td>
</tr>
<tr>
<td>Laurentian</td>
<td>103</td>
<td>108</td>
<td>111</td>
<td>7%</td>
</tr>
<tr>
<td>Waterloo</td>
<td>321</td>
<td>343</td>
<td>344</td>
<td>7%</td>
</tr>
<tr>
<td>Ottawa</td>
<td>278</td>
<td>289</td>
<td>302</td>
<td>8%</td>
</tr>
<tr>
<td>Nipissing</td>
<td>79</td>
<td>102</td>
<td>89</td>
<td>11%</td>
</tr>
<tr>
<td>UOIT</td>
<td>91</td>
<td>73</td>
<td>107</td>
<td>15%</td>
</tr>
<tr>
<td>York</td>
<td>255</td>
<td>268</td>
<td>299</td>
<td>15%</td>
</tr>
<tr>
<td>Toronto</td>
<td>69</td>
<td>78</td>
<td>86</td>
<td>20%</td>
</tr>
<tr>
<td>Ryerson</td>
<td>175</td>
<td>204</td>
<td>220</td>
<td>20%</td>
</tr>
<tr>
<td>Windsor</td>
<td>184</td>
<td>193</td>
<td>232</td>
<td>21%</td>
</tr>
<tr>
<td>Trent</td>
<td>36</td>
<td>61</td>
<td>57</td>
<td>37%</td>
</tr>
<tr>
<td>Brock</td>
<td>59</td>
<td>65</td>
<td>96</td>
<td>39%</td>
</tr>
<tr>
<td>Carleton</td>
<td>78</td>
<td>103</td>
<td>136</td>
<td>43%</td>
</tr>
<tr>
<td>Algoma</td>
<td>6</td>
<td>16</td>
<td>18</td>
<td>67%</td>
</tr>
<tr>
<td>McMaster</td>
<td>6</td>
<td>27</td>
<td>22</td>
<td>73%</td>
</tr>
<tr>
<td>OCADU</td>
<td>0</td>
<td>5</td>
<td>10</td>
<td>100%</td>
</tr>
</tbody>
</table>
Aggregated results shown in Table 8 indicate that the number of online courses offered in the province increased by 5.34% and 5.45% in 2012 and 2013 respectively.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total courses</th>
<th>Increase in Courses</th>
<th>% Annual Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>2769</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2012</td>
<td>2917</td>
<td>148</td>
<td>5.34%</td>
</tr>
<tr>
<td>2013</td>
<td>3076</td>
<td>159</td>
<td>5.45%</td>
</tr>
</tbody>
</table>

The analysis of the Ontario university data available through the annual MYAA reporting process suggests that USA post secondary institutions, including privately funded institutions, have had a higher rate of adoption of online learning overall. However, if rates of growth are compared, the evidence of rapid enrolment gains in online courses as well as the increase in the total number of courses offered suggests a period of accelerated growth and capacity development within Ontario universities from 2011 to 2013. The enrolment growth averaged 13.14% per year during this period, while the increase in number of course offerings averaged 5.4% per year. These quantitative data provide evidence of increased institutional attention to capacity development and reflect a movement toward acceptance of online learning as an important and viable delivery option within the sector.

**Strategic Mandate Agreements (SMAs)**

Institutional attention to the potential for growth in online learning program delivery is also reflected in the SMAs universities have more recently been required to prepare for the MTCU. Over the course of the last decade, the nature of accountability agreements, differentiated mandates, and the metrics for evaluation has evolved. While initially planned as multi-year, bilateral agreements with annual report-backs, there was an expectation on the part
of the provincial government that the process would serve to increase accountability (Paniagua, 2014, p. iv). The negotiation of their individualized "agreement" gives rise to an opportunity for institutions to formally communicate their differentiated strategic goals to the MTCU.

Inclusion of elements of online learning strategies in SMA agreements first occurred in the 2012 submission cycle. In August of that year, the ministry asked each Ontario university to submit an SMA proposal that would identify their highest priority objectives and an implementation plan to be outlined according to a new standard template (Contact North, 2013d). The timing of this first round for SMA negotiations followed directly after the MTCU had published their discussion paper regarding their aim to transform PSE within the province. Thus the preparation coincided with the moment when government messaging regarding the need to increase productivity and expand access through use of innovative technology-based strategies was at a peak, as noted in the chronology outlined in Chapter 5.

As all of the SMA proposals were posted publicly on the Higher Education Quality Council of Ontario web site, university leaders, analysts and agencies (including Contact North), had the opportunity to review and consider the strategic directions communicated by institutions from across the province. In their white paper prepared at this time, Contact North (2013d) noted that the publication of the SMAs "kicks off what will most likely be a dynamic and wide-ranging sector-wide conversation during the next period" and that it would be "fuelled by the spontaneous cross analysis" by management teams at post secondary institutions as well as other stakeholder groups or associations to "ascertain the overall directions that are emerging" (p. 3). The visibility of publicly communicated strategic intentions served to amplify the elearning policyscape, and confirmed that many of the province's universities were considering online learning as an important element in reaching
their strategic goals.

According to the Contact North white paper, from among the 21 universities submitting agreement proposals, 18 specifically mentioned plans for an increase in online or blended learning activities (p. 4). However it is noted that some of the institutions highlighted initiatives that were already in progress, while others described bold plans for future activities. In some cases requests for funding were included. Review of the SMAs submitted in 2012 confirmed the prevalence of references to online learning. A number of the smaller or more geographically remote institutions included highly specific goals related to expansion of online course offerings. Three institutions presented budget requests to support such expansion. Reference information for all SMA proposals is included in Appendix D.

The purposes and goals of elearning described in the 2012 SMA proposals are an extreme example of use of symbolic models to communicate espoused institutional values. In response to trends in the broader policyscape, online learning was taken up as a legitimate aspiration for those universities seeking to expand their enrolment and align with the stated productivity and access objectives of the provincial government. The most common theme was a vision of increased access through provision of flexible learning options, linked to increased enrolments from within the province and beyond. This reflects elements of Duus' market-based paradigm. A second common theme was the innovative use of technologies to improve productivity. However, instead of focusing on reducing program duplication or scaling up class sizes, the SMA proposals presented a different value proposition, suggesting that the benefit to the MTCU and the broader public would be more and better learning. In other words, the benefit would be an improved ROI for government funding. This latter theme reflects the technology-based paradigm in Duus' ideal-type framework, albeit a shift to a strategic
approach that aims to expand each universities resourcing and capacity, rather than to rationalize existing system-wide activities by leveraging technology-based solutions. Table 9 shows selected examples of institutional goals from these early SMA proposals.

<table>
<thead>
<tr>
<th>Table 9</th>
<th>Examples of Ontario university institutional goals presented in 2012 SMA proposals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>University of Waterloo</strong></td>
<td>Lead a regional university consortium to develop online course and resources. (p. 8)</td>
</tr>
<tr>
<td></td>
<td>Explore innovative approaches for course sharing and exchange and develop delivery models that can be expanded across the province and beyond. (p. 9)</td>
</tr>
<tr>
<td><strong>Ryerson University</strong></td>
<td>Ryerson University requests $2 million annually for five years to support the incremental costs of expanding the number of online courses created to 120 annually. (p. 8)</td>
</tr>
<tr>
<td><strong>Carleton University</strong></td>
<td>In the next three years, Carleton will develop online courses that make some of its key, internationally focused programs available to students from elsewhere in Canada and around the world. We will develop clusters of courses that enable these students to obtain diplomas and certificates as a recognized building block towards a full degree. (p. 7)</td>
</tr>
<tr>
<td><strong>Nipissing University</strong></td>
<td>... expect to introduce new programs and certificates that incorporate the “NEXT PRACTICE” in blended and online learning over the next five years. (p. 5)</td>
</tr>
<tr>
<td></td>
<td>... grow and support student access to education through flexible and innovative programming ... blended learning and online models of delivery and access. (p. 5)</td>
</tr>
<tr>
<td></td>
<td>Nipissing embraces an educational world without borders. (p. 5)</td>
</tr>
<tr>
<td><strong>Brock University</strong></td>
<td>We have invested substantially in the operations of our Centre for Pedagogical Innovation and as a result, we are significantly increasing our online and hybrid course offerings. (p. ii)</td>
</tr>
<tr>
<td></td>
<td>Growth will continue over the next three years, with a projected enrolment target of 15,000 by 2016-17. (p.4)</td>
</tr>
</tbody>
</table>
While these differentiating strategies proposed by institutions were framed as a form of negotiation with the MTCU, there was no funding linked to implementation, nor was there any accountability for delivery arising from the process. Given the delays and the lack of clarity on strategic direction from the provincial government, it is not surprising that universities proceeded with planning and capacity development activities within their own institutions, independent of government programs of differentiation and prior to the roll out of course development funding incentives.

**Analysis of Institutionally Initiated Strategic Planning Activities**

While SMAs symbolized espoused beliefs regarding the value of elearning, another layer of strategic planning informed the theory-in-use dimension of online learning strategy implementation at the individual university level. Valuable information as to the plans and purposes of Ontario’s universities can be found within institutional strategic plans, academic plans, task force reports, and recommendations to governing bodies with regard to online learning goals and capacity development directives. A collection of these publicly available documents was assembled through systematic web search as part of Phase 2 of the data collection and through recommendations for additional materials gathered during the second interview process.

Given the increased institutional attention to capacity development and the movement toward acceptance of online learning as a viable delivery option within the sector, several institutions mobilized their planning by a striking task force or working group to undertake an environmental scan and make elearning strategy recommendations to inform achievement of their broader mission. There are five institutions that conducted internal strategic planning processes and generated reports specifically related to online elearning strategy during this
period: Ottawa, Carleton, York, Western, and Waterloo. Four others, Brock, Ontario College of Art and Design University, Ryerson, and Trent, specifically mention elearning strategy in institutional strategic plans developed within this timeframe. Other universities presented more veiled allusions to innovative teaching and technology-enhanced curriculum in their academic planning documents or teaching support strategy plans. Of the 20 Ontario universities included in this component of the study, only three institutions had no internal plan or strategy document reference to online learning. Representatives from four universities indicated that elearning strategy documents were currently in development, but not available publicly. As noted previously, a full list of institutional strategy documents reviewed as part of this study are included in Appendix E.

**Theme analysis.** The institutional strategy documents were analyzed and coded for thematic messaging and operational directives based on Duus' framework once again. Use of the same framework to analyze communication at the upper levels of the policy implementation staircase as well as at lower levels within Ontario sectoral hierarchy is essential to the research method of this study. Analysis of the themes from documents revealed elements that aligned with aspects of each of the four ideal-typical models. This signals the universities' ability to navigate a range of paradigmatic views that are influential within a single institution through an integrated strategic plan, but also foregrounds tensions between levels within the hierarchy. Notably, the greatest thematic emphasis was firstly on addressing access and enrolment goals linked to a market-based perspective, and secondly on supporting an innovative pedagogy-based paradigm through faculty support and effective curriculum development strategies. The distribution of references to institutional strategies across the range of four paradigmatic ideal-types is outlined in Table 10.
Table 10

*Distribution of thematic elements from Ontario university internal strategy documents across Duus' four paradigmatic models*

<table>
<thead>
<tr>
<th></th>
<th>Technological</th>
<th>Market-Based</th>
<th>Pedagogical</th>
<th>Content-Based (Traditional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure Development</td>
<td>3</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resolving Operational Issues</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increasing Enrolment</td>
<td></td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexible Access</td>
<td>1</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building Partnerships</td>
<td></td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generating Revenue</td>
<td></td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget Considerations</td>
<td></td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty Development</td>
<td></td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Launching New Teaching/Learning Support Centre</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Addressing Student Needs</td>
<td></td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensuring Quality</td>
<td>7</td>
<td>2*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Innovation</td>
<td>2</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Positioning (ie core strategy)</td>
<td>3</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Constraints (ie IP/Assessment issues)</td>
<td></td>
<td></td>
<td>2*</td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>7</td>
<td>19</td>
<td>33</td>
<td>5</td>
</tr>
</tbody>
</table>

* Includes references to problematic aspects of faculty adoption of new models

**New markets and budget.** As revealed in this snapshot of the distribution of elearning strategy themes within internal planning documents in Table 10, one of the common areas of focus was on the market-based model. This was frequently framed either as meeting learner demand for access, or as an opportunity to increase enrolment and generate additional revenue for the institution. In some cases the need for additional resources to support expansion of
capacity in this area was included in the strategic recommendations, often with reference to budgetary considerations. This line of discussion is evident in strategic documents at many institutions in Ontario during this period. This theme area is illustrated in the excerpts presented in Table 11.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Excerpt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Opportunities</td>
<td>Expand Waterloo’s footprint in the eLearning market. (Waterloo, 2013, p. 28)</td>
</tr>
<tr>
<td></td>
<td>With sufficient enrolment, online courses represent a revenue source, and Western should develop planning processes that support an enhanced online presence. (Western University, 2013, p. 6)</td>
</tr>
<tr>
<td></td>
<td>There are current and emerging opportunities for York in online learning – to provide greater access and choice to our students and to attract new students. Timely action is needed to move York into the fully online arena. (York University, 2013, p. 3)</td>
</tr>
<tr>
<td>Budgetary Considerations</td>
<td>Additional resources will evolve through the development, implementation, and maintenance phases [for blended learning]. It is estimated that the required resources would amount to four FTE.... equivalent to approximately $315,000 per year. (Ottawa, 2013, p. 37)</td>
</tr>
<tr>
<td></td>
<td>There seems to be recognition that the financial case for greater investment in online learning is dubious. Thus, any policies should be based on quality of teaching and learning activities, rather than financial benefits. (Queen's University, 2013, p. 9)</td>
</tr>
</tbody>
</table>

**Pedagogical innovation.** A second area where the focus of the messaging was evident across most institutions concerned innovative pedagogical design and emphasis on maintaining a high standard of quality in the delivery of programs. Research-intensive universities tended to focus on pedagogical innovation and evidence-informed design. Plans for expanding faculty
development activities and launching new services related to teaching and learning support were noted in several of the planning documents. A few universities were concerned with improving IT infrastructure to increase productivity or to improve connectivity, however most references to innovative technologies were linked to pedagogical benefits. Excerpts from institutional strategy documents are provided in Table 12.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Excerpt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovative Pedagogical Design</td>
<td>... puts McMaster on track to become Canada’s premier centre for evidence-based pedagogy at a research-intensive university. MIIETL provides strong pedagogical and technological expertise to enable program enhancement and technology integration, as well as supporting and championing research on teaching. (McMaster University, 2014, p. 2)</td>
</tr>
<tr>
<td></td>
<td>... In this paper President Lightstone advocates for pervasive pedagogical innovation as a “defining characteristic” for Brock University, with specific reference to online learning, service learning, and accelerated and blended course delivery. (Brock University, 2014, p. 4)</td>
</tr>
<tr>
<td></td>
<td>The Committee recommends the establishment of an interdisciplinary, multi-stakeholder, experimental &quot;Centre for Teaching, Technology, and Learning.&quot; (Trent, 2012, p. 19)</td>
</tr>
<tr>
<td>Technology-enabled improvements</td>
<td>Provide leading-edge, technology-enabled learning opportunities. (Waterloo, 2013, p. 28)</td>
</tr>
<tr>
<td></td>
<td>... leveraging technology to transform existing courses where learners produce and share knowledge as global citizens [Referencing internal strategy documents at McMaster]. (Z. Sayed, personal communication, December 10, 2015)</td>
</tr>
</tbody>
</table>
Other. Along side the focus on pedagogy, the technology-based paradigm was diminished as the institutional strategic plans more often focused on innovative aspects of online curriculum design to achieve overarching academic goals and enhance learning experiences. Thus market- and pedagogy-based perspectives were well represented, while technology-based models were present in a much lesser degree. Given that evidence of elearning strategy elements was a criterion for inclusion of institutional documents in the set collected for analysis, it is not surprising that there were few references to the fourth model, the traditional, content-based paradigm. Some institutions acknowledged that a range of delivery modes could be appropriate, including classroom-based models, as shown in this example: "Moving forward, the programs and courses using eLearning technology should be strategically identified. The modes of delivery (e.g., web-enhanced, blended, fully online) should be decided based on the best fit with the disciplinary pedagogy and student needs" (York University, 2013, p. 2). More frequently, references to content-based models were linked to issues of faculty buy-in and the need to overcome existing cultural and operational barriers. In addition to advancing arguments for the quality of the student experience, advocates for this perspective advanced the viewpoint that academic freedom and autonomy over the teaching process needed to be preserved. A post on the OCUFA web site noted:

It is our strong belief that all online learning initiatives should be focused on promoting student success... It is also vital that online learning in Ontario protect academic freedom, respect the intellectual property rights of faculty, and preserve local autonomy in academic planning. (2013, p. 1)

Resistance to online learning among faculty and the potential valuing of more traditional teaching modes was recognized in several elearning strategy documents, as noted in Table 13.
Table 13

Excerpts from *Ontario university internal strategy documents related to faculty support and buy-in*

<table>
<thead>
<tr>
<th>Theme</th>
<th>Excerpt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Buy-In and Support</td>
<td>Members also recognize that instructor “buy-in” is of critical importance to the success of any online learning strategy. (Carleton University, 2012, p. 6)</td>
</tr>
<tr>
<td></td>
<td>... the University must find ways to incent and support faculty and to ensure that the online learning experience is not a compromise of academic standards. (Western University, 2013, p. 3)</td>
</tr>
<tr>
<td>Faculty Concern</td>
<td>Several expressed fundamental concerns about the changing role of faculty, and, indeed, some perceive e-learning as a threat; if first-rate content is widely available through Massive Open Online Courses and by other means, as it is in some disciplines, could the role of faculty begin to resemble that of tutors or teaching assistants? (Western University, 2013, p. 3)</td>
</tr>
</tbody>
</table>

While an important success factor, detailed consideration of the sociological and organizational strategies to address faculty buy-in at the institutional level are beyond the scope of this study.

In spite of resistance at the faculty and program level, even within a very traditional university setting, the global policy landscape can be seen to have had an impact on level of acceptance of online learning, if not on practical implementation. A report on online learning at Queen's University suggested the inevitability of the need to develop a strategy to navigate the forthcoming change as follows: "Even among the most strident antagonists, there is an acknowledgment that online teaching approaches have the potential to facilitate student learning. Furthermore, we could envision no scenario where a modern university would divorce itself from online technologies" (Queen's University, 2013, p. 10). Later in the same report, the authors noted: "We get the impression that a great deal of time is being spent on discussing the merits of online technologies when the reality is that online courses will become
more prevalent whether we participate or not" (p. 81). This conclusion points to the influence of emitters in the broader policyscape on the attitudes and accepted norms within the sector, and its pervasiveness at all levels of the implementation staircase.

**Summary of Phase 2 document analyses.** Analysis of internal strategy documents has provided a more nuanced mapping of the perspectives and corresponding themes that dominated strategic planning related to elearning initiatives within the Ontario university sector. In Figure 8 the areas of tension are noted as dashed-line circles, while the areas of alignment are noted as solid-line circles.

![Figure 8. Points of alignment and tension at the institutional level of implementation. Themes identified in Phase 2 document analysis are shown as an overlay on top of the themes identified in Phase 1. Solid line circles indicate alignments and dashed link circles indicate tensions.](image-url)
In the figure above, the themes that emerged from the Phase 2 document analysis of institutional strategy plans and reports are mapped as an overlay on top of the themes identified in Phase 1. In contrast to the espoused beliefs revealed in the SMA proposals, the institutional strategic planning documents were more likely to reflect the practicalities of enacted theory-in-use and an internally integrated approach which potentially spanned multiple paradigmatic viewpoints. For the most part, institutions did not adopt the technology-based paradigm of increased productivity or efficiency as a goal within their planning processes. While there was some alignment with MTCU framing of its priorities within a market-based paradigm, the institutional planning processes showed a much greater emphasis on pedagogy-based considerations and improvements to the student learning experience as a value proposition. Some institutional working groups noted the persistent framing of face-to-face classes as the gold standard of university education, and the need to be attentive to maintenance of quality in online courses. This was particularly the case among research-intensive universities at an early stage of entering the online learning arena. The evidence of this, and other differentiated responses linked to key institutional characteristics such as size, location and focus of mission are explored in more detail in the next chapter.
CHAPTER 8
FINDINGS PART 3: PERSPECTIVES FROM THE FRONT LINES

To complete the data collection for Phase 2, a series of semi-structured interviews were undertaken with administrators responsible for online learning initiatives at universities across Ontario. In this chapter, I describe the process and the findings for this final component of the two-phase methodology. The observations are illustrated with example quotes from participants. The final section of this chapter contains a synthesis of the document analysis, interview data and quantitative data in terms of the reaction to the initial implementation of the provincial initiative and the impact on operational process at the institutional level. When combined, these observations of leadership response, institutional strategy and front line experiences together complete the exploration of the fourth research question:

4. How does the combination of the broader policyscape and the provincial initiative influence the interpretation of the goals and purposes of elearning across these three steps of the policy staircase?

As described previously, for this second stage of interviews, the recruitment process lead to participation of individuals from 14 of the possible 20 universities in the province. The interviewees were diverse in terms of their institutional context, with a range of large and small, as well as research-intensive and teaching-oriented universities represented. The data collected through these interviews with institutional elearning administrators regarding their observations and experiences were compared with the thematic patterns from institutional document analysis. It should be noted that these interviewees were not asked to represent their institutional view, and in some cases brought the perspective of a specialized office or decentralized online learning support function. As with Phase 1, the themes and value
propositions identified were mapped against Duus' ideal-typical framework. By tracing the informal and formal messaging within institutions through the lens of interviewee experiences, both the espoused beliefs that are put forward as institutional values and goals, and the enacted practices as theory-in-use have been surfaced.

**Backstage Messages from University Leadership**

In the Phase 2 interview process, participants were first asked to reflect on their observations of the backstage reaction of institutional academic leaders and also the informal messaging shared through informal communications in response to the announcement of the new provincial initiatives.

**Resourcing implications.** A primary area of concern was related to the resourcing and financial implications, particularly in terms of government funding and revenues linked to enrolment. More than half of the interviewees signalled the importance of financial considerations in their institutional response. One commented that "It is not a money saving endeavour. Done well it is going to cost more money" (Participant H). Another interviewee expressed reservations regarding the overall business impact on universities in the province:

> We have invested a lot of money in online courses and trained a lot of faculty members and we weren't sure what would happen with our own online programs and enrolments....

> Creating an entire new university would have an impact on the business of other universities. (Participant P)

While interviewees reported that their institutional leaders had a general openness to engagement in the sphere of online learning, there was also resistance to having new structures rolled out that might negatively impact market share. Others feared a differentiation among institutions that would not be by choice, but rather through competition. The following
comments provides insight into their concerns:

Unless we can create really competitive good online courses... there was the danger of the net loss in revenue going forward... The one time funding, with a commitment to offering the course for five years, included no provision for sustainability, for ongoing changes. So the onus was on who then? (Participant B)

You could read between the lines that this notion of reducing duplication was one way, around courses being offered... of enacting that differentiation policy. Quite frankly, around the province the differentiation conversation kind of fell flat on its face. No one wanted to take it up. (Participant H)

The question of the relationship of differentiation to the provincial online learning strategy was not the only strategic element addressed in terms of impact on operations. Five interviewees from smaller or geographically remote universities described uncertainty about their capacity and the availability of resources to engage in the new elearning strategy. Here are some illustrative comments:

As an institution we want to be in the game and are playing along. Our president would like us to lead the way, but we do not have the resources, personnel, and a well-oiled course development process... we are not there yet in online learning. (Participant G)

There was a lot of concern about the fact that maybe some of this would start to envelope us... We are such a small fish in this big pond. What is going to happen to us, and the online courses that we have developed? (Participant F)

These comments indicate that resourcing and financial impact were key points of concern.

**Framing as opportunity or threat.** Interview data revealed mixed responses, as some perceived the shifting landscape of elearning to be an opportunity, while others saw it as a
threat to their current position within the sector. Table 14 presents examples reflecting the range of positive and negative responses.

<table>
<thead>
<tr>
<th>Positive/Negative View (+/-)</th>
<th>Excerpt</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>There was never any thought that we would not be part of the consortium. And it was some place that we wanted to go and our senior leaders recognized that online programs are something we need to focus on, develop, move forward on. (Participant L)</td>
</tr>
<tr>
<td>+</td>
<td>Ultimately, my senior administration was really excited for the opportunity to be involved and thinking that this is a good way forward, because it holds a lot of potential. (Participant C)</td>
</tr>
<tr>
<td>+/-</td>
<td>There was excitement that something was happening, but there was also quite a bit of suspicion from the senior management in some quarters. (Participant M)</td>
</tr>
<tr>
<td>+/-</td>
<td>There was excitement over the potential that we might be able to do some interesting things and extend what we do, but also a degree of scepticism. (Participant E)</td>
</tr>
<tr>
<td>+/-</td>
<td>OK... fantastic initiative. How can we make sure that we have a presence somehow and a voice, and that we are somehow included? That was the first reaction. (Participant D)</td>
</tr>
<tr>
<td>-</td>
<td>The administration was very concerned and it created a fear—people didn’t talk openly about the institute. (Participant P)</td>
</tr>
</tbody>
</table>

**Changing paradigms.** Interviewees were then asked to describe any paradigmatic shifts they had observed, as reflected in the more formal institutional elearning strategy communication. Eight of the interviewees described a general shift in the prioritization of online learning activities, indicating a movement from the periphery towards consideration as a core function within the university. For example, one interviewee observed that the leadership
"became more aware of it [elearning] as the mainstream as opposed to that 'add on' that we were 10 to 15 years ago" (Participant I). Additional comments describing this outcome included the following:

   It reinforced the importance. It came at a critical time and so it solidified the chances of online learning being integrated into the strategic plan. The external factors and the recognition... at the time were part of it. (Participant E)

   ... a strategic integrated plan that was developed, where online learning was a component of it. I'm not sure that online learning would have been as strong without the conversations and the awareness around what the Ministry was trying to do with Ontario Online. (Participant J)

While responses varied widely, there was evidence that in many cases the MTCU initiative had had an impact on institutional priorities and increased the dialogue internal to universities regarding the purposes and goals of elearning initiatives. The balance between optimism and concern appears to have been determined by the pre-existing state of maturity of elearning strategy prior to the introduction of the provincial initiatives. Those that were at an early stage of adoption or were still struggling with resource capacity to support elearning initiatives more often communicated concern about the risk regarding reduction of duplicate course offerings, scalability and differentiation strategies.

**External Influences**

   **Global trends.** With regard to the impact of the broader policymakingscape, the increased levels of interest and acceptance of online learning as a core capacity among Ontario universities were seen to align with global trends. Participant reflections on internal discussion surfaced comments such as "There was a lot of talk about national and international
campaigns" (Participant P) and questions such as "What is [institution] going to do and invest its time and effort in, with regard to remaining on the forefront of innovation in teaching and learning?" (Participant E). One interviewee was particularly concerned with remaining current with regard to emergent pedagogies:

How is this going to look 5 - 10- 15 years from now and can you really afford to just keep doing what you have always been doing? .... We don't want to find out that we have antiquated pedagogies for a climbing group of students. (Participant L)

In the phase two interview data there were ten mentions of important emitters in other jurisdictions. The Open Educational Resources and Open Textbook initiatives of BCcampus were each specifically mentioned. The pace of adoption in the USA was referenced by two participants, two others referenced competition from Athabasca university, and one noted the influence of visitors from Australia. Contact North was described as an important influence among three smaller universities in terms of the initial consultation and in provision of useful models for collaboration and outreach. No single model stood out as a primary exemplar, but there was evidence of institutional awareness of notable initiatives in other locales.

**MOOCs: positive and negative.** More than two-thirds of the interviewees specifically described the impact of the MOOC phenomena as having had a significant influence on the discussion within their institution, reflecting both positive and negative views as to its potential. The adoption and legitimization of the MOOCs through partnerships formed by the most elite universities attracted the attention of many presidents and senior academic leaders who were enamoured by the idea of a technology-based productivity gain through scaling of course size. It was also seen as a public relations opportunity that would draw attention to the offerings of their institution. However, several of the interviewees were opposed to the idea of
MOOCs, in some cases holding views contrary to the aspirations of their university leaders. Two condemned the costliness, while others criticized the market-based paradigm for lacking the pedagogical underpinnings of high quality online course design. Examples of viewpoints on MOOCs garnered from the Phase 2 interviews are presented in Table 15.

### Table 15

*Interview excerpts regarding university leadership responses to the MOOC model of online course delivery*

<table>
<thead>
<tr>
<th>Positive/Negative View (+/-)</th>
<th>Excerpt</th>
</tr>
</thead>
<tbody>
<tr>
<td>+/-</td>
<td>The decision was that [institution] will not do MOOCs. However, the president had a strong interest in doing MOOCs. So MOOCs got put into the strategic integrated plan... (Participant J)</td>
</tr>
<tr>
<td>+</td>
<td>[Academic leader] was also enthused by the idea of the MOOCs and various ways that we can highlight the expertise that we have at [institution]. (Participant I)</td>
</tr>
<tr>
<td>-</td>
<td>He – like every other President at the time – seemed to think it important to have a University MOOC. I suggested a needs analysis to see what he thinks the value of this would be... is there a subject he wants to promote? As a flagship? Was it a vanity thing? (Participant B)</td>
</tr>
<tr>
<td>-</td>
<td>...that whole notion of new markets and disruption in higher ed, doesn't really echo ... that doesn't have a lot of resonance here... MOOCs are very expensive. (Participant H)</td>
</tr>
<tr>
<td>-</td>
<td>...we had a discussion internally, should we or shouldn't we jump on the MOOC bandwagon... what is [institution] going to do and invest its time and effort in, with regard to remaining on the forefront of innovation in teaching and learning? (Participant E)</td>
</tr>
</tbody>
</table>

Whether in agreement or not, one overarching outcome was initiation of discussion of online learning at the highest levels of leadership, typically engaging the president, provost, board of governors or chairs and deans. Now that MOOC hype is in the past (Siemens, 2015,
xiv), the tension has apparently eased and the profile of MOOCs within the general educational policiyscape has lessened. However, it has left a legacy of having contributed to putting elearning "on the map" and increased acceptance of online learning generally. For some leaders it has served to legitimize the possibility of online learning at scale. Overall, the broader policiyscape, influence of models implemented in other jurisdictions, and especially the MOOC phenomena, have together had a significant impact on the strategic and tactical approach of institutions within the Ontario university sector with regard to online learning capacity development.

**Other Key Issues and Paradigmatic Tensions**

In addition to the controversy regarding the MOOC model, there were a number of other conflicting perspectives that were amplified at the lower levels of the policy implementation staircase, particularly after the funding program for course development was rolled out in 2013. During the interview process, participants frequently spoke about the overarching goals and potential benefits of online learning programs. As professionals in the field of online learning, they were understandably committed to advancing institutional understanding of effective strategies in this domain and recognized the potential of online learning as a possible policy solution to several pressing challenges. However, there was evidence of significant tensions regarding the impact of provincial initiatives, frequently related to lack of alignment of the stated problems and the proposed solutions. As suggested by the garbage can model (Cohen et al., 1972, p. 16), there is evidence that the definition of the problem was being uncoupled from the solutions being implemented. Table 16 below outlines some of these key issues and indicates the number of participants who indicated that these were points of tension in the development of a strategic approach within their institution.
Table 16

Summary of challenges in institutional alignment with provincial elearning initiative as reported by Phase 2 interviewees

<table>
<thead>
<tr>
<th>Theme area</th>
<th>Issues</th>
<th>Paradigmatic Tension</th>
</tr>
</thead>
</table>
| Larger gateway courses idea problematic        | • Potential negative impact on enrolment/revenue planning for universities sending students to large course elsewhere (4)  
• Goal of avoiding duplication in tension with differentiation agenda (2)  
• No common credit transfer equivalencies across all institutions (2)  
• Large intake causes bottlenecks downstream in second year courses (1)  
• Resistance to MOOC model being generalized to large online courses (2)                                                                                                                                                                                                                                                                                                                                                           | • Resistance to technology-based models of increased productivity through large scale common course offerings                                                                                                                                                                                                                                                                                       |
| Path to efficiency gains through collaboration unclear | • Anticipated consortial collaboration in online curriculum development lacks incentives and mechanisms for accountability (3)  
• Faculty resistant to practice of sharing/IP issues (3)  
• Collaboration is labour and resource intensive and hence not efficient (2)                                                                                                                                                                                                                                                                                                                                                                           | • Resistance to technology-based paradigm of productivity gains through distribution of shared online courses and resources                                                                                                                                                                                                                                                                                                                           |
| Lack of level playing field                   | • Smaller institutions with limited resources to mobilize on strategy and proposal development perceived to be disadvantaged (4)                                                                                                                                                                                                                                                                                                                                                     | • Resistance to market-based model of competition rather than equity for smaller and geographically remote universities                                                                                                                                                                                                                                                                                                               |
| Scepticism regarding government-driven agenda | • Innovation seen as a disguise for productivity agenda (1)  
• Bureaucracy may diminish innovation (1)  
• Faculty buy-in to change of practice difficult to achieve (3)  
• Timelines too short for development and deployment process (4)  
• No continued support for ongoing course iteration and maintenance (2)                                                                                                                                                                                                                                                                                                             | • Resistance to technology-based paradigm of transformation of current teaching practice if compromising quality and sustainability                                                                                                                                                                                                                                                                                                                      |
| Opportunities Missed                          | • Failing to support small programs that are marginal; laddering and bridging programs (1)  
• Not leveraging openness to partnerships and program collaboration within northern network (2)                                                                                                                                                                                                                                                                                                                      | • Resistance to market-based paradigms that prioritize demand over specialized needs across a range of learner populations                                                                                                                                                                                                                                                                                                               |
The interview process thus revealed considerable tension around the elearning strategy implementation on the front lines, and as a result a number of issues arising from differences in paradigmatic underpinnings were identified. Key themes expressed can also be mapped against the ideal-typical framework, highlighting areas of dissonance between the espoused aims of the MTCU online learning strategy and the theory-in-use enacted at the institutional level as in Figure 9. This figure shows these front-line themes mapped across the four paradigmatic ideal-types, to demonstrate the prevalence of points of tension within the technology-based and market-based quadrants. Themes and directives supported at all levels of the implementation

![Figure 9. Comparison of concerns of Phase 2 interviewees with other thematic priorities. Mapping shows concerns are presented in bold font and presented as an overlay across the four paradigmatic ideal-types.](image-url)
staircase, including the provincial ministry, are indicated in grey circles. Points of tension are highlighted in bold inside dashed-line circles, while alignments are shown in bold in solid-line circles. This detailed analysis shared in this chapter and the mapping to the paradigmatic model informs our foundational understanding of the fourth research question in this study by exploring the dynamic and impact of the process of policy proposal development and implementation across the lower steps of the policy staircase. In the final section of this chapter the backstage experiences at the institutional level are more closely examined.

**Dynamic and Impact of New Policy Initiatives**

As noted earlier in this chapter, prior to the introduction of the provincial directives, universities across the province had developed their own elearning-related goals and strategies. While the adoption level was lower than that seen in the USA (Seaman & Allen, 2010), the rate of growth early in the period of this study was very strong. According to interviewee's reports, universities across the province were ramping up operational capacity to develop and deliver online courses. When asked during the interview, two-thirds reported an increase of staffing resources to support online course development and faculty support, either on a contract or on a continuing basis. More than half of those interviewed indicated they had experienced a re-structuring of the internal university organization to enable capacity within the past 2-5 years, most frequently with the hiring of instructional designers and media developers. However, in spite of this overall trend toward expansion of capacity, significant differentiation in response to the provincial strategy was evident among the Phase 2 interviewees.

The course development funding incentives created considerable navigational complexity for institutions. Strategic agility was required to compete for financial resources through an RFP process aligned with the MTCU’s technology and market-based models, while
at the same time remaining in harmony with their university community's pedagogy-based values and resistance to change. This was further complicated by the short timelines and also the lack of clarity on intended outcomes, which was mentioned by every interviewee. However, existing academic programming plans and administrative processes were influenced by the lure of development resources in a time of fiscal austerity. A summary report of the provincially funded course and module projects is provided in Appendix I, showing the distribution across Ontario institutions over the three-year period. Observations regarding the varied institutional capacity to access these funds is described in the following section.

**Shifting strategy and agility.** Interviewees from those Ontario universities with a very high volume of online courses in absolute numbers, as noted in Figure 7, were much more confident in their ability to navigate the winds of change. While protection of anonymity prevents linkage of interviewee comments to a specific university, there were some pointed observations regarding the need for agility among those representing institutions well-positioned in the province with regard to number of online course offerings. The following are examples related to different aspects of the RFP interpretation and implementation in particular:

You could tailor the budget and development strategies to your own institution. We just shaped the budget and the proposal based on our production practices and it seemed to work. There was a lot of angst about why certain institutions got funding and others didn't. (Participant E)

If you read implicitly between the lines, it was an opportunity for MTCU to engage or at least drive some of the changes they wanted to see in the sector... pathways, collaboration and differentiation. But the way that it's actually brought to bear thorough the shared
course funding - it's lip service at best that is paid to those kinds of things. (Participant H)

The second RFP was set up to encourage cooperation, but did not - from our perspective - really initiate what I would call institutional collaboration. Its instituted cooperation between faculty members, between institutions, but strategically, it has not impacted as the Ministry wanted it to. (Participant J)

Some of leaders were able to interpret and leverage the opportunity to the advantage of their own institution. The rhetoric was filtered and re-framed to meet their own internal needs.

**Difficulty navigating.** A different experience was reflected in the observations of the participants from smaller, teaching-focused institutions, and also from some institutions in more remote locations. Participants from such institutions noted concerns about navigating a path to participation and having a voice at the table. For example, one commented "It turned more to deciphering pathways. Is there a plan, or do we have to forge the path? If we want to have input, where can we do that?" (Participant C). Another framed a similar question: "How can we make sure that we have a presence somehow and a voice, and that we are somehow included?" (Participant D). Even in the early consultation phase, these particular groups within the university sector anticipated challenges and barriers to their participation. The more neo-liberal aspects, particularly elements of marketization, were also seen as problematic for many institutions. This concern was highlighted by interviewees from those smaller or geographically remote schools where it was perceived they had less capacity to compete either for funding or for enrolments, and were especially concerned about the impact of a market-based model, or funding program differentiation that favoured those already well-established in terms of infrastructure and human resources. This is illustrated by the following comments: "We are a small force in the market and want to make sure that we are able to be positively
impacted, rather than negatively impacted by the whole unfolding of the strategy" (Participant I); "We are really on shoestring resources to get everything done" (Participant D). These interviewees observed that there was general concern about potential negative impact.

**Student mobility - advantage or threat?** Several interviewees at the smaller or geographically remote locations also indicated that their institutions were interested in partnerships with other universities and colleges to open up new programs areas or pathways to completion. Initially they optimistically hoped for an opportunity to leverage this as a strength, given it aligned with the credit transfer and student mobility goals of the new strategy. For example, one interviewee observed "We know that some courses are one term at one institution, and one term at another institution, so we said, well this whole idea of collaboration is great and maybe we can augment what we are offering" (Participant I). Another noted that "We collaborate on our courses already, because we have a peer review process for all our online courses. So we have input from faculty from other universities" (Participant D).

However, these schools were often disappointed to find little opportunity to either collaborate or access resources to achieve those goals:

To me that is not real collaboration. That is an attempt at collaboration to game the evaluations system, to get the money. So in a sense, while that [collaboration] might have been MTCU's intent... I just think it didn't play out the way the way that it was intended to. Or didn't drive the change. (Participant H)

Later on, with the funding and composition, I don't think that our university was heard or that a lot of emphasis was placed on what we do or what our history has brought forward. We tried to be at the table. (Participant D)

Three interviewees reported that this was exacerbated by the fact they were also facing budget
shortfalls, funding cuts and dropping enrolments. Some felt that a more equitable distribution of resources would have been the correct course of action by the MTCU.

A final source of tension was evident in the perception that the more research-intensive universities had exercised their influence to push back against the proposed directives and transformative elements of the MTCU strategy, ensuring that their own interests, including access to funding, were protected. This is illustrated in the comment that "Power talks to power" (Participant A) and the recommendation that "It would be better for each university to get a certain amount of funds, based on, maybe their size...based on some kind of characteristics of the university" (Participant F). In particular, it was observed by one interviewee "the seven large institutions drove the agenda because they feared that this would allow smaller institutions to 'steal' students from their systems" (Participant J). As reflected in these shared perspectives, the experience of the universities across the sector showed considerable differentiation in terms of their strategic agility, navigation and interpretation the new initiatives, and success in leveraging collaborative opportunities to meet their needs.

**Accessing funding.** The ability of various segments of the university sector to access funds also differed significantly. It is worth noting that the distribution of capacity across the province prior to introduction of a provincial strategy and funding programs showed that the research-intensives had not collectively dominated online learning in terms of total course registrations, although Waterloo and Western were historically leaders, as illustrated previously in Figure 7. These early data show that several of the strong research universities, including McMaster, Toronto and Ottawa, had been slow to adopt fully online course delivery in the undergraduate sphere. In comparison, several of the smaller universities had already invested in extension of their reach through online learning program initiatives.
Available data confirm this high level of early investment in elearning capacity among smaller or more remote universities, in spite of their resource constraints. This pre-existing capacity can be better understood through comparison of quantitative data. For example, the total number of courses offered can be presented as a ratio of total student population at a given institution. For this analysis, data regarding student population at Ontario universities were drawn from the Ontario Council of University Libraries (OCUL) web site (2014), as they were not available through COU or MYAA reports. The results for 2012, the last year prior to the introduction of the MTCU funding initiative, are shown in Table 17.

Table 17

Student population to online course offering ratio for 2012 with institutions ordered smallest to largest

<table>
<thead>
<tr>
<th>Partner Institutions</th>
<th>FTE Students 2012a</th>
<th>Undergraduate Courses 2012</th>
<th>Online Course to Student Population Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algoma</td>
<td>1,028</td>
<td>16</td>
<td>0.0156</td>
</tr>
<tr>
<td>OCAD</td>
<td>3,614</td>
<td>0</td>
<td>0.0000</td>
</tr>
<tr>
<td>Nipissing</td>
<td>5,604</td>
<td>73</td>
<td>0.0130</td>
</tr>
<tr>
<td>UOIT</td>
<td>6,761</td>
<td>49</td>
<td>0.0072</td>
</tr>
<tr>
<td>Trent</td>
<td>7,344</td>
<td>61</td>
<td>0.0083</td>
</tr>
<tr>
<td>Lakehead</td>
<td>8,360</td>
<td>165</td>
<td>0.0197</td>
</tr>
<tr>
<td>Laurentian</td>
<td>8,366</td>
<td>88</td>
<td>0.0105</td>
</tr>
<tr>
<td>Windsor</td>
<td>14,675</td>
<td>93</td>
<td>0.0063</td>
</tr>
<tr>
<td>Brock</td>
<td>15,693</td>
<td>62</td>
<td>0.0040</td>
</tr>
<tr>
<td>Wilfrid Laurier</td>
<td>15,874</td>
<td>223</td>
<td>0.0140</td>
</tr>
<tr>
<td>Queen's</td>
<td>22,481</td>
<td>91</td>
<td>0.0040</td>
</tr>
<tr>
<td>Carleton</td>
<td>22,496</td>
<td>88</td>
<td>0.0039</td>
</tr>
<tr>
<td>Guelph</td>
<td>24,725</td>
<td>213</td>
<td>0.0086</td>
</tr>
<tr>
<td>McMaster</td>
<td>26,543</td>
<td>2</td>
<td>0.0001</td>
</tr>
<tr>
<td>Ryerson</td>
<td>28,560</td>
<td>204</td>
<td>0.0071</td>
</tr>
<tr>
<td>Waterloo</td>
<td>31,388</td>
<td>334</td>
<td>0.0106</td>
</tr>
<tr>
<td>Ottawa</td>
<td>34,961</td>
<td>220</td>
<td>0.0063</td>
</tr>
<tr>
<td>Western</td>
<td>35,002</td>
<td>299</td>
<td>0.0085</td>
</tr>
<tr>
<td>York</td>
<td>47,949</td>
<td>127</td>
<td>0.0026</td>
</tr>
<tr>
<td>Toronto</td>
<td>72,885</td>
<td>15</td>
<td>0.0002</td>
</tr>
</tbody>
</table>

aBased on OCUL 2012 data
To illustrate the investment in online learning capacity prior to the provincial funding initiatives being launched, the resulting ratio was used to create a comparative bar chart showing the capacity ratio across all universities in sequence in Figure 10.

*Figure 10. Online course to student population ratio. In this chart the total number of courses offered is presented as a ratio of total student population at a given institution for the year 2012.*

In Figure 10 which, analyzes capacity relative to size, several of the smaller northern universities, including Lakehead, Algoma, Nipissing, and Laurentian, all appear in the top six in the province. With the exception of Waterloo, the research-intensive universities had not been those with the highest relative investment in elearning capacity. It is not surprising that some of those most committed to providing access to remote students, and who also had high relative investment in elearning program development, were dissatisfied. Some described barriers to successful participation in a funding program that potentially could align with their strategic goals and differentiation strategies based on their location in remote geographic
locations. This created tensions between northern and southern regions within the province and exacerbated the sense of inequity within a competitive system.

**Summary of Phase 2 Analysis**

In terms of internal alignment, the interviews with institutional leaders undertaken in Phase 2 echoed many of the published statements regarding the elearning strategy goals and priorities of their institutions. The aspirations reflected in SMA proposals and institutional strategy documents revealed a high level of isomorphism as institutions strove to adopt the models seen in the global policyscape and respond to MTCU directives regarding transformation of the university sector. The experience at the institutional level of response reflected in the Phase 2 interview process demonstrated strategic agility in some cases, as institutions negotiated a path that would be acceptable to their local community, yet address the goals and criteria that the MTCU outlined in their high level conception and detailed RFP communications. As noted in the previous chapter, the provincial macro-paradigmatic messages were shifting toward a negotiated common ground, bridging the tensions and resistance by softening the stance and also by incentivizing with financial resources through an RFP process. Framing as a government-funding program rather than a cost-saving agenda allowed a shift toward considerations such as access, flexibility, and other learner and market needs.

However, a number of ruptures were also evident in the reception to elearning strategy within Ontario university sector. In spite of the global groundswell and the provincial financial incentives, faculty were resistant to change in practice at the institutional level, unless clear benefits to the institution and to students could be demonstrated. In the face of potential risk in adopting new delivery modes, many institutional leaders set a conservative path that aimed at
leveraging the MTCU funding resources, yet resisted the transformation that the province had originally prescribed during the height of the MOOC phenomenon. Those responsible for institutional finances were looking for a good ROI, or better still, opportunity to increase revenue. Institutions sought a value proposition that resonated within their community, and many were concerned about internal factors and practical implications for developing and sustaining online courses.

Additionally, a number of aspects of the strategy implementation were persistently flagged as problematic. In many cases the issues arose due to lack of alignment with paradigmatic grounding underpinning the MTCU’s stated goals. Across the province, in both institutional strategy documents and in the observations of interviewees, a counter-narrative of pedagogy-based focus on student learning dominated. This was reinforced by active resistance to MTCU notions of technology-based efficiencies and productivity gains. In other cases the challenges related to informational and operational barriers to implementation, resulting in a disconnect between the intended and actual outcomes.

While many of the interviewees described common experiences, there were also some patterns of differentiation, depending on the characteristics of the university. The competition between institutions was exacerbated through the race for access to funding resources, which was seen as a threat by both the larger and research-intensive institutions, as well as smaller and teaching-focused universities. As the northern and remote universities had previously successfully competed for registrations in their online programs, some were frustrated by exclusion from new funding resources based on criteria perceived to be influenced by powerful and elite research-intensive universities in the southern or more densely populated areas. Some smaller, teaching-focused institutions shared this experience. It became a source of tension due
to differences of opinion as to the appropriateness of a competitive, market-based approach to resource allocation for what was becoming a core delivery mechanism across all universities. The level of concern was especially high for smaller institutions in more remote locations that felt vulnerable to potential decreases in enrolment share. This unexpected outcome appears to be at odds with the espoused values of the provincial elearning strategy in terms of promotion of collaboration and sharing of courses and resources across the system.

In general, a perceived lack of leadership and consistent vision on the part of the provincial government was a point of tension at the institutional level, just as it had been among intermediary organizations. Dissatisfaction with the conception and management of the initiative, including lack of practical details on a province-wide implementation strategy was a common observation. Larger and research-oriented universities were concerned with more strategic aspects, calling for improved leadership on the provincial initiative and clarity of vision on implementation plans, while smaller and northern universities focused more on communication and governance, emphasizing equity, transparency and inclusion.
CHAPTER 9
DISCUSSION

The purpose of my study was to answer the primary research question: How have symbolic models for strategic success in the shifting elearning policyscape been conceptualized and integrated across the Ontario university sector? In order explore this question I have analyzed in detail the elearning strategy within this sector with attention to points of tension and alignment across the system. The idea of policyscape as a theoretical framework has been applied to the evolution of the strategy within Ontario over a four-year period in order to assess the influence of global forces beyond the boundaries of the province. The varied strategic responses have been mapped across the upper levels of the policy implementation staircase, from the provincial government through intermediary organizations to the individual institutional level, using Duus' series of four ideal-typologies as a measuring stick for comparison.

In this final chapter I first analyze the observations described in the previous three chapters, which have addressed in sequence each of the sub-questions informing the study:

1. How are dominant elearning paradigms reflected within the macro- and meso-level public messaging on strategy and policy?
2. How do those paradigmatic messages compare with viewpoints and responses to evolving elearning strategy and policy within intermediary organizations in the sector?
3. How are Ontario universities navigating provincial messaging on elearning, global influences, and internal pressures, as reflected in their strategic responses; and
4. How does the combination of the broader policyscape and the provincial initiative influence the interpretation of the goals and purposes of elearning across these three steps of the policy staircase?
The implications of these findings, in particular those associated with persistent paradigmatic clashes and related tensions impacting the policy development process, are then explored in detail. Given that system-level analysis of elearning policy process is an emergent area of study, the significance of the findings lies primarily in the surfacing of new research fronts that are deserving of further attention. The discussion is thus structured around important dimensions of elearning policy incubation, as they have been framed by actors within the policy community during the period of this study. For each of these key dimensions, related aspects of existing higher education policy research literature are explored, with the aim of extending understanding within the domain of elearning in particular. The focus is placed on the themes within the policy discourse that were revealed to be most highly-charged through the progressive analysis across the hierarchical administrative steps within the sector.

The discussion of the findings begins with consideration of three key dimensions influencing the process of elearning policy incubation: inter-institutional collaboration, pedagogy-based values, and equitable access to resources. Secondly, the theoretical concept of the policyscape is revisited, with specific attention to the notion of disruptive innovation. Other key factors are then discussed, particularly the importance of path dependency and the unique characteristics of this period of accelerated policy incubation. I conclude the chapter with a summary of the key elements of the negotiation process reflected in this vertical case study, implications for policy development processes, and a discussion of recommendations for further research exploration to support effective elearning policy implementation in the future.

**Summary of Analysis**

In general, the findings suggest that there have been significant tensions between participants in the policy development process as new elearning strategy directives have been
introduced and implemented. Analysis of the data revealed that the most significant points of tension arose as a result of government promotion of new models aimed at economic and productivity gains that have been borrowed from the broader policyscape. The findings show institutions resisted such models as they responded to their internal stakeholder concerns and navigated existing contextual constraints.

**Upper tiers of the implementation staircase.** Through the process of analysis of ideal-typical paradigms evident in public documents and data collected in Phase 1, several divergent models were identified within the top tiers in the implementation staircase. As will be described below, tensions were related to notions of disruptive technology, coherence of collaborative and competitive models, and issues around quality of instruction.

Firstly, the paradigm of technological intervention as a disrupter leading to increased productivity and efficiency to achieve cost savings was not palatable to intermediary organizations representing stakeholder interests within the Ontario university community. The meso-level organizational leaders did not see alignment between this framing of an online learning initiative and their stakeholder interests, and were sceptical as to the benefits of rapid, technology-driven evolution of delivery strategies. Similarly, the MTCU prescription for innovation at the system level through transformative restructuring to improve student access and mobility met with resistance from the universities and their instructors as the proposed changes were seen to be in conflict with fundamental principles of institutional autonomy and differentiation, as will be discussed later in this chapter. The only notable outliers were student stakeholder groups who supported this line of policy direction, as the flexibility of credit transfer was attractive in terms of potential savings in tuition cost and time to completion of programs.
As the initiative was rolled out, additional tensions emerged as the credibility and coherence of the government's stated strategic direction was questioned by those who were expected to implement the directives. In particular, the MTCU's espoused goals of accountability and quality were seen to be contradicted by inconsistent leadership, lack of clear goals and absence of relevant evaluation metrics. This led to high levels of dissatisfaction across the sector, which was expressed in the policy community discourse and advocacy efforts. Additional sources of friction were the emergence of market-based models of competition for provincial enrolments, as well as internal competition for funding resources. This competition for tuition revenues and government grants was perceived to be in conflict with the idea of consortial collaboration on shared online course development. However, this was mitigated by the emergence of some more productive cooperative opportunities through RFP structures that supported development of reusable, modularized digital materials.

Significant tension was also evident in the response of representatives of faculty and student interests. The expectation that technology-based innovation and scaling of course size would act as a catalyst for change and potential cost-savings was problematic for these stakeholders, who voiced concern regarding the impact on the student experience. The locus of innovation was thought to be more appropriately aimed at improvement of curriculum design, building on the many years of research on best practice in online delivery. Advocates for faculty interests also saw the new Ministry-lead initiatives as a threat to instructor ownership of content and a possible compromise to maintaining levels of quality comparable with that of face-to-face courses. Given the ministry messaging around efficiencies and avoidance of duplication, concern was also evident regarding the role of the instructor and their connection with the teaching function, leading to further tensions as traditional teaching models were
challenged.

As demonstrated through the identification of these significant points of tension among key stakeholder groups, the varied adoption and interpretation of paradigmatic models is a core finding of this study. During the early stages of discussion the provincial elearning policy development process required acknowledgement of these perceived barriers and clashing values in order to move toward shared understanding of a possible path forward. Mapping of the subsequent responses at the institutional level provides deeper insight into dynamics of the "multiple streams" of policy process, as described by Kingdon (1984, p. 16-17).

**Turbulence amongst the institutions.** The impact of the new provincial initiatives became evident in the responses at the institutional level. A common reaction was increased attention to strategic planning and infrastructure implementation to support online learning activity, as evidenced in the many institutional elearning strategy documents generated. Data from government reports also show quantitative growth in online course delivery during this period. These are two strong signals that elearning strategy was increasing in importance within institutions. However there was evidence of some variation between the paradigmatic models advanced by the government and espoused institutional ambitions articulated in the strategic plans, in comparison with the enacted theory-in-use. For example, the SMAs proposed in 2012 collectively showed a response to global policyscape, government directives and isomorphic pressure in the expressed aspirations to leverage elearning strategies and demonstrate leadership in innovation. This outward-facing communication was highly aligned with the government's expressed strategic direction. Internal task force reports and strategy documents also acknowledge global trends to some degree. However, institutional inward-facing communication of strategy was frequently more focused on concerns regarding
operational and socio-cultural issues.

Through the process of analysis of ideal-typical paradigms evident in public documents and data collected in Phase 2 interview processes, several particularly contentious sources of tension have been identified at the institutional level in the implementation staircase. While the value of the symbolic models of elearning benefits advanced by the government were recognized, a number of sources of conflict created barriers to advancement of the "policy stream" (Kingdon, 1984, p. 17), including financial implications, quality assurance, and faculty participation. Policy problems and solutions often became uncoupled.

An early response from institutional leaders was heightened concern regarding the additional cost of development and maintenance of new services and initiatives associated with online course and program development. Those responsible for finances questioned the potential for return on investment and were concerned with the impact on their bottom line in the absence of a convincing business case. The provincial funding model for universities provided no ongoing financial incentives to institutions, and it was anticipated that the new provincial portal would actually escalate internal competition between provincial universities for market share of student enrolment. This was seen to be problematic, as promotion of credit transfer for single courses among Ontario students did not result in new revenues to the sector as a whole. Both large and small universities that lacked strength in the elearning domain saw a vulnerability in terms of erosion of their undergraduate program mainstay introductory courses.

Further, while the provincial government promoted the model of single large-scale introductory online courses, at an institutional level there was scepticism regarding the pedagogical strength of what was perceived as a MOOC-like model. This concern was evident among academic leaders as well as administrators responsible for operationalizing online
learning initiatives within universities. Many institutions flagged the need for development of online design and teaching skills among faculty as an area of concern, and while most universities already had teaching and learning centres providing faculty development and instructional design support, additional resources were seen as essential to ensure the quality of course and program design and instruction. Finally, faculty resistance to new models for design and delivery of courses and programs was an internal issue noted in some institutional strategy documents. After a wave of early online course pioneers, in some cases getting the buy-in and participation of additional instructors became problematic. Instructor concerns regarding decreased autonomy and the loss of valuable classroom experiences needed to be negotiated within institutional strategic planning process.

These issues were perceived to be practical or technological barriers to adoption of elearning paradigms promoted by the government. Thus, at the institutional level, in spite of the increasing espousal of new models, a number of factors slowed formal integration and informal acceptance of the elearning as a core activity. These findings highlight the conflicting demands facing institutions during this time of turbulence. On the one hand there is evidence of increased strategic integration and internal support for elearning to align with the direction of the provincial policy stream as it moved toward new solutions for existing issues. At the same time elearning was framed as a potentially costly threat to the status quo and the autonomy of the academy. This divergence of government and institutional paradigms was manifested as a tension between the external or "popular" functions of the university and the "autonomous" functions that are the day-to-day internal operations of the university as described in the research literature (Pinheiro, Benneworth & Jones, 2012a, p. 244). In the following section the discussion will explore key dimensions influencing the process of
elearning policy incubation during this period of competing priorities.

**Key Dimensions Influencing the Process of eLearning Policy Incubation**

While some of the findings discussed in the previous section reveal evidence of foreseeable institutional responses to the proposed goals of the provincial government, there were also unexpected outcomes. One was a lack of transformative collaborative initiatives. Secondly, while a number of alternate value propositions were developed, these were accompanied by uneven participation in the provincial initiatives. This resulted in a polarization within the province along the axis of north to south, as well as large and small. In the following section I will discuss these three key dimensions of these outcomes identified through the data analysis process: *inter-institutional collaboration, pedagogy-based values,* and *equitable access to resources.*

**Inter-institutional collaboration.** As noted previously, while appealing to some university leaders, many questions remained as to the feasibility of implementing consortium models that leverage scalable technologies and shared services to achieve productivity gains (Keegan et al., 2007). Turning back to the research literature, we find influential cases illustrating the challenges as there were several cases of consortium closures in the USA, Australia and Europe in the early 2000s (Curran, 2008; Mayadas, Bourne, & Bacsich; Trounson, 2009). A more recent closure noted by the media was the elimination of the U2 "Semester Online" after Duke and Vanderbilt Universities and the University of Rochester withdrew from the consortium of elites participating in the initiative (Straumsheim, 2014). However, some newer research literature and white papers foreground evidence of successes that reinforce government messaging on the potential of technology-enabled, flexible access to education being delivered effectively (Bates, 2014b; Bowen, 2012, Miller et al., 2013; Selingo,
Carey, Pennington, Fishman, & Palmer, 2013;). Examples of consortial models such as those seen in Australia, Florida and Texas have been championed by proponents who seek efficiencies gained by collaboration and coordination at the state or system level. As revealed in the data collected in this study, the discourse within Ontario included both proponents and critics of the possibility of an effective provincial consortium.

Conceptualizing a consortium model was challenging for all concerned, hence the COU commissioned an environmental scan of possible frameworks as a strategic project in 2014. According to the final report authored by Hampson (2014), the diversity in types of consortia is the result of the recombination of key features in different ways. These features have included a mix of financial models, services, contributions of members, and government funding interventions. Hampson's report echoed seminal research undertaken by Fishman (2013) regarding the range of possible approaches to working collaboratively within a consortium. Fishman's work articulated a hierarchy of models that have been successfully implemented in the university sector as regional strategies. At the foundational level is the provision a clearinghouse, described as "one search portal to find the online courses and degree programs offered at every public postsecondary institution within the state system" (p. 9). At the highest level of complexity and integration, supported by coordination and collaboration within a regional educational system, students would have the possibility of "seamless credit transfer" within and beyond the boundaries of their home institution or even between jurisdictions (Fishman, 2013, p. 9). To date, Ontario has achieved only a foundational level of cooperation in implementing a provincial portal to support discoverability of online course and program offerings (eCampus Ontario, 2016a).

In her approach to analysis of online learning consortium models, Fishman (2013) took
a highly instrumental view of critical success factors associated with development of an effective consortium. She highlighted the importance of establishing a sustainable funding model, credit transfer equivalencies, incentives, and faculty and learner supports. During the initial implementation period in Ontario, there was a vision of increased credit transfer opportunity facilitated through funding incentives aimed at co-development. However, those involved at the operational level perceived significant economic barriers to institutional participation by Ontario universities. These barriers were primarily linked to existing funding models that have provided no benefit to the home institution of a learner when a credit toward program completion is earned elsewhere. Further, the home institution would have carried the responsibility for overall student support, which is a cost typically twice that of course development, according to research on the costs of online learning (Bates, 2014b). Bates further notes:

For consortia to work, there has to be a synergy and a mutual respect for the other partners in the consortium. In a large system it is unrealistic to expect automatic transfer of credits between every institution in the system, although some states, such as California and Florida, have gone a long way to building equivalencies between courses in different institutions that facilitate formal credit transfer arrangements, through subject discipline articulation committees. But that is very hard work, takes many years to build, and requires a common vision and mutual respect. That is very hard to achieve in systems that put so much emphasis on competition and rankings. (2014b, para. 8)

To Fishman's instrumental view, Bates thus added normative, and even socio-cultural dimensions to the list of challenges. Although a highly integrated consortium model and sharing of large-scale online courses were key elements in the original suite of policy solutions
advanced by the MTCU, these collaborative aspects of the strategy implementation have continued to be problematic, and only the most basic information sharing portal has been achieved. The framing of a deeply integrated consortial model as a compelling proposal was hindered by lack of incentives in the face of social, economic and technological barriers.

**Pedagogy-based value propositions.** Given that the support for a policy solution promoting economies of scale within and across course offerings based on a highly collaborative consortia models was very limited, the COU and other intermediaries introduced alternative value propositions that would leverage government investment in online learning, while at the same time re-frame the nature of the problem. The propositions included: a) funding for individual institutions to (re)develop courses if appropriate for wide-spread credit transfer, and b) incentivizing development of re-usable modularized material intended for adoption across several courses. Rather than tackling what Bates described as the "hard work" of building deeply collaborative processes, this model allowed each institution to maintain its autonomy by moving the notion of innovation into the pedagogy-based and content-based paradigm. Negotiation for inclusion of this alternative value model is evident in the criteria for the second round of the Shared Online Course funding program (COU, 2014), and serves as an example of the inductive strategy development process described in Chapter 6. While satisfying the provincial paradigm of increased productivity, due to an ambiguous definition of collaborative efforts and efficiency gains, it also provided unexpected leeway for alignment with internal goals at the institutional level.

For some universities and program areas, this alternative framing of the problem and solution provided a grassroots opportunity for collaborative co-development of curriculum content. It has been suggested that the facilitated sharing of pedagogical approaches and peer-
based faculty development initiatives has the potential to act as a valuable lever for change (Carey, 2014). Rather than a focus on productivity gains through reduction of duplication, the co-design and re-use of content was thus seen at the institutional level as an avenue for improvement of quality. This represents a significant shift from the original paradigmatic vision put forward by the MTCU. This repositioning was successfully negotiated by the COU on behalf of its members and eased a policy stream logjam that appeared to be slowing participation. Ambiguity of intention on the part of the universities allowed the purposes of the development work to be seen to satisfy both the aims of the government, and the priorities of the institutions. The use of ambiguity was recognized by Cohen, March & Olsen in their later work (2012, p. 26), when they described the full range of "ambiguous preferences, unclear causal understanding, fluid participation, and the varying accessibility of decisions." Pinheiro et al. in their discussion of institutional processes for balancing competing tensions (2012b, p. 12), also understood the concept of ambiguity as being valuable in the context of university dynamics. The idea of leveraging ambiguity to facilitate policy process will be revisited in the last section of this chapter.

**Equitable access to resources.** A final, unanticipated dimension was the polarization within the province along the axis of north to south, as well as between larger and smaller sized universities. As noted by Kingdon (1972, p. 18), political events may serve as an impetus or act as constraint to change. While the investment of substantial funding in elearning initiatives was well received by stakeholders within the province, the uneven distribution of the funding created a backlash likely to influence future decisions and the ongoing discourse and activity across the multiple streams of policy process.

As noted in the government report data presented in Figure 10, prior to the introduction
of the new provincial initiatives, the smaller and northern universities had successfully competed for student registrations in their online courses. The MYAA report data provide evidence of their investment in online learning and success in terms of attracting students. Four interviewees from smaller or more remotely located universities affirmed their commitment to providing online access to meet the needs of students in their region. Some, particularly those further from the Greater Toronto Area, were frustrated at their inability to compete effectively for new funding resources. While extending the reach of their services was acknowledged as core to their mission, there was disappointment in not being able to tap new funding to support and extend their work in this domain. They described the primary issues as the competitive RFP structure and lack of equity in distribution of the funding.

Some interviewees from universities with a teaching focus were frustrated by the dominance of institutions that are research-oriented and perceived to have been more influential during the COU advisory committee discussions, thus maintaining the status quo. This observation is also in line with the findings of Pinheiro et al., which indicate that institutions that either are, or aspire to be, research-intensive universities have a "natural tendency to actively resist change, usually by protecting their core activities from external disturbances" (2012a, p. 243). It was suggested that the research-focused institutions were interested in accessing new resourcing opportunities, but reluctant to change structural arrangements that might impact enrolments or result in new credit transfer compliance requirements. The published data on the distribution of Shared Online Course funds provide evidence that the patterns described by the interviewees are confirmed in the 2015 reports on successful previous applications for funding (OOLC Memo, 2015).

While larger and research-intensive universities were able to mobilize to access the
incentive funds, the actual impact of the provincial initiative on their operations was minimized as the course sharing arrangements outlined in the terms of the funding required only a loose coupling to existing institutional administrative processes. Larger and research-focused institutions were thus advantaged in their capacity for coordinating an agile response to provincial directives and elearning funding opportunities, while maintaining the status quo. In fact, the data shows that some research-intensive universities began to very proactively pursue the opportunities for market expansion, potentially at the expense of their smaller and northern counterparts. Queen's University was perhaps the most dramatic example of this phenomenon. As noted in Figure 10, this institution historically had relatively low levels of online learning relative to size. However, data provided by the COU on funded projects (COU, 2015a) and subsequent awards for the 2016 academic year (eCampusOntario, 2016b) showed that Queen's successfully secured 19% of the total Shared Online Course funding available to universities in 2014, 21% in 2015, and 30% of the total for 2016.

The polarization between north and south, smaller and larger, and the teaching- and research-focused institutions thus created significant tensions within the province. Some benefited from what can be described as a market-based paradigm within Duus' ideal-type framework, while others were disadvantaged by the competitive, or neo-liberal approach to distribution of resources. This added further complexity to an existing situation, in which establishing consortial collaboration was proving challenging. It is unlikely that these outcomes were anticipated at the upper levels of the implementation hierarchy when those responsible were conceptualizing the foundational components of a provincial policy solution.

These key dimensions, lack of system-wide collaboration, new value propositions, and polarization as a result of the competitive process, were unexpected, yet likely to be influential
in the ongoing process of elearning policy incubation. They extend our understanding along several threads of existing research and provide further provide insight into the underlying policy stream processes. In the following section I will move beyond the provincial initiatives and institutional response, expanding on consideration of the fourth research question, which aims to explore the influence of the broader policyscape. In particular, the concept of disruption will be considered, with attention to its symbolism within the ideal-typical heuristic analysis. Finally two frameworks for understanding resistance to change will be discussed: counter-balancing contextual factors affecting the sector, and path dependency as an influence on response to external and internal pressure.

**Implications of Global Policyscape Framing**

In this section of the discussion, the theoretical concept of the policyscape is revisited in relation to the findings of the study, followed by exploration of the implications of the symbolic model of *disruptive innovation*. The evolution of elearning strategy in Ontario has had resonance with the research literature describing the impact of the global policyscape and its isomorphic effects. As previously noted, during the focus period of this study, there was widespread attention given to elearning, MOOCs and new digital learning strategies in the media and in higher education strategy conversations (Brown, Costello, Donlon, Giollamhichil, & Kirwan, 2015: Contact North, 2013b; Kovanović, Joksimović, Gašević, Siemens, & Hatala, 2015; Siemens, 2015). Given the level of media attention, it is not surprising to find that both the government and the university sector were influenced by the global normative pressures to adopt elearning strategies and promote new online learning models.

The general trends within the broad policyscape have also been reinforced by examples from other jurisdictions and sectors that informed the early conception of the desirable
transformation. Both document analysis and data from key informant interviews suggest a desire to replicate initiatives implemented by peers in other national, state or provincial systems. While resistance to the initial aims and vision expressed by the MTCU was reflected in the response at the institutional level, there is also evidence of integration of global norms across most universities in the province during the period of this study.

Several areas of university activity that reflect developments within the global policymatscape can be identified. Firstly, many interviewees noted that during this period internal consultation and information gathering on elearning increased within universities, as institutional leaders sought to be informed on both the trends in the broader environment and the relevance of activities in this domain. In a number of cases, senior academic leaders introduced new planning processes to address emergent interests in elearning, suggesting an increased focus on strategic agility within the sector. At the same time, universities already engaged in capacity development continued along their established trajectories of increased investment in online learning as a legitimate delivery modality. This steady growth is reflected in government reports that require institutions to provide quantitative data on elearning activity. As noted previously in Tables 5 and 7, a comparison of yearly reports shows steady growth in offerings. Interviewees from some Ontario universities also reported significant infrastructure investment.

Across the sector, within discussion papers, task force reports and internal strategic documents, there was evidence of the emergence of new value propositions regarding the benefits of elearning capacity development. Though differing from the initial stated goals of MTCU, these strategic plans reflect a commitment to elearning as an avenue to improve quality and flexible access. At the same time, the symbolic model of economic benefit through
increased access was frequently reframed within institutional strategies as a goal of maintaining or expanding their market share of Ontario students. This reframing was possible due to increased acceptance of elearning as a legitimate delivery model and a progression from being situated peripherally to being perceived as a core institutional service. For example, internal strategic plans often signalled increased operational support and integration through additional central resourcing for infrastructure, faculty development and new teaching centres. Thus online learning strategy has frequently been integrated into overall institutional strategy.

Interviewees in Phase 2 of the data collection indicated that, while not explicitly discussed by their institutional leaders, the symbolic models evident in the broader elearning policyscape catalyzed this extension of existing capacities to align with the global trends. To some degree this increased focus on elearning aligned with the goals of the MTCU. Some interviewees also noted the influence of general rapid change within the broader higher education landscape. They saw a pressure on their institutions to "keep up" and maintain currency, lest they miss an opportunity seized by their peers. The global policyscape thus reinforced legitimacy and importance of adoption of elearning strategies within the Ontario university sector.

However, in addition to consideration of ruptures, Stromquist's model also calls for analysis of continuities. This lends importance to the fact the universities were resistant to change in the form of collaborative models for increased efficiency and productivity through shared course offerings, as was championed by the MTCU early on. Rather, "substantial translation" (Stromquist, 2013, p. 223) occurred in their interpretation of ideas prevalent in the broader policyscape to ensure relevance to their local needs and minimize disruption to their core functions. This framing softens the idea of policyscape advanced by Carney (2011) who
attributes a stronger influence by global educational policyscape on reconfiguration of local institutions and the resulting "new arrangements of culture and power" (Carney, 2011, p. 7). The findings of this study suggest that the policyscape was influential in terms of what could be described as "rhetorical force" (Robertson, 2012, p. 44), but did not have the destabilizing effect anticipated in Carney's work.

**Disruptive innovation revisited.** As discussed previously, a related theoretical concept is the idea of "disruptive innovation." Given the repeated mention of innovation within the policy documents and interview transcripts, further consideration of Christensen and Raynor's (2003) concept of disruptive innovation as a powerful symbolic model is warranted, particularly its relation to the ideal-typical framework underpinning this study. This requires unpacking the underpinnings of the theoretical model and existing literature on the topic in further detail.

Alongside the buzz of the global policyscape regarding international markets, technology-enabled resource sharing, and the emergence of the MOOC phenomena, there was a thread of discourse linking elearning to this business and management strand of literature during this period (Christensen, 2011; Hedberg, 2006; Heilesen & Josephsen, 2008; Kamenetz, 2010; Meyer, 2010; Rossiter, 2007). Some of the research literature considering elearning through the lens of economic or business management strands has incorporated Christensen's idea of disruptive innovation as an opportunity, while others have seen it as a threat. One argument that has been applied in this context is that regardless of whether a threat or an opportunity, all organizations have to cope with the disruption of the unfolding digital revolution, and education is no exception (Katsomitros & Lawton, 2012). The need to understand and navigate these new online learning models has been the target of pervasive
discourse regarding potential for "disruptive innovation," particularly linked to a technology-based and market-based paradigms.

However, a closer reading of the original theoretical conception provides additional insight into its application in the Ontario university sector context. As noted by Jacoby (2014), Christensen indicates there are two key enablers that are required in order for disruption to occur. Firstly, there must be a technology enabler that allows the innovation to be available to people not previously accessing the service. Adoption of online learning at scale, for example, could be seen as the technology enabler underpinning the change. However, Christensen also asserts that as a second key enabler, the business model much change as well. Specifically, he notes "disruption does not occur if an existing model co-opts an innovation to ensure its own continuation" (Christensen et al., 2011, p. 3). In the case of online learning in Ontario, while there is strong growth in adoption of new learning models, there may be sufficient ambiguity in terms of the intended outcome that the existing business model is protected and sustained.

It has also been argued that Christensen's theory alone is simply insufficient to inform the likelihood of diffusion (Schmidt & Druehl, 2008). McPherson and Bacow (2015) cautioned that the outcomes of disruptive innovation will not be determined by the technology alone, but rather by the exercise of judgment by citizens and also by the decisions of educational, business, and political leaders (p. 151). King and Baatartogtokh (2015) similarly concluded that "stories about disruptive innovation can provide warnings of what may happen, but they are no substitute for critical thinking... high-level theories can give managers encouragement, but they are no replacement for careful analysis and difficult choices" (p. 81). In his well-known eLiterate blog, Phil Hill (2015, para. 13) further emphasized that this is particularly true in the educational context, with its "mission driven institutions, non-
commodity outcomes, and poorly-understood basics on how to even define learning."

There are a number of recent examples in the literature and scholarly work in which researchers question the power of disruptive innovation. Taking a different angle, Watters (2013) critiqued the radical predictions of Christensen and his co-authors as being narrowly oriented toward business practices, with insufficient attention to grounding of higher education in pedagogy-based paradigms. Other white papers have called for a more measured consideration of the value of scalable online learning, use of data analytics to tune programs and provision of the right "mix" of options to support students effectively (Bowen, 2012; Fishman, 2013; Contact North, 2013c; Contact North, 2014a; Miller et al., 2013; Siemens, 2015). Fishman and Siemens have both called for more pragmatic attention to the affordances and limitations of elearning, in essence moving beyond the peak of the hype cycle (Gartner, 2016) into a phase of integration. This evolution toward a more pragmatic approach to MOOCs in particular has become evident in both the media and in scholarly literature (Kovanović, Joksimović, Gašević, Siemens, & Hatala, 2015; Siemens, 2015). Kovanović et al. note that since 2013, the public debate has moved from the "previous hype around million dollar investments and proclamations of 'disruptive change' to a more balanced and productive discussions related to the position of MOOCs in the broader spectrum of educational modalities" (p. 525).

Resistance to the rhetorical force of a technology-based paradigm leading to radical transformation has thus been newly visible as a counterpoint to the idea of disruptive innovation in some white papers, blog posts and even in scholarly works. Paralleling this emergent viewpoint, an approach of measured consideration is prevalent in the university sector in Ontario, where new models have been adopted by institutions, but with a careful eye
to the continued stability of existing business models and focus on academic mission.

**Counter-balancing contextual factors.**

The Ontario universities' advocacy regarding the protection of their core value to learners was manifested in the tepid response to government enthusiasm for new technology-based and market-based transformation. Furthermore, issues such as operational challenges and conflicting incentives were forwarded as arguments for resistance to proposed collaborative models. In this section, contextual factors that countered the lure of global policyscape emitters and new elearning models are discussed, in particular the importance of *path dependency*. Both the document analysis and the interviews surfaced persistent evidence of operational issues in tension with the symbolic models presented in the broader policyscape, including the previously discussed idea of innovative disruption. Key factors were risk aversion, conflicting inter-related policy instruments, and lack of incentives.

A strong culture of risk aversion may be related to the fact that all of the universities included in this study are publicly supported, and thus sensitive to negative publicity regarding strategic decisions. The data from interviews undertaken in this study showed that only a few university presidents expressed interest and enthusiasm for transformative change. During the Phase 2 interviews, senior administrators responsible for practical implementation expressed caution regarding the possibility of rapid change without sufficient planning. These individuals have been influential in steering both cultural norms and operational changes at the institutional level.

On a practical level, interviewees reported barriers created through inter-related policy instruments and internal financial constraints. In some cases these were linked to provincial funding models that de-incentivize institutional support for student mobility. In other cases
universities faced start-up costs and ongoing resourcing burdens to sustain a high quality online programming. As well, the differentiation and accountability requirements advanced by the new SMA process may have resulted in a reduced willingness for risk taking in this domain.

While the Shared Online Course development funding and the normative participation in the provincial portal mobilized institutions, there were very few other practical incentives for universities to move from their current strategic path. The late entry of the government of Ontario into the elearning arena meant that many institutions had already established their strategy, the result being little benefit in shared resources or consortial collaboration. As a result, thus far there has been only a superficial change at the system level with regard to change in practice.

In summary, cultural norms, operational issues and lack of incentives are contextual factors that support the continuity of existing institutional models, rather than rupturing as a result of global policyscape influences. Collectively, these factors reinforce oppositional behaviour and serve as a counter-point to the idea of influential policyscapes, confirming Stromquist's concession that while the overall trend is toward convergence, "innovative ideas about a university undergo some modification as the they travel from emitter to adopter" (2013, p. 241).

Path dependency. In this review of the unfolding case within Ontario, a final lens of educational policy research that provides insight into the oppositional stance is the notion of path dependency and its influence on institutional strategy. There are two factors that are particularly important in determining the path dependence of Ontario universities. The first is the relatively high level of institutional autonomy, and the second is the prevalence of a differentiation agenda. This section will conclude with a brief discussion of both of these
factors.

**Institutional autonomy.** As noted above, among Ontario university leaders and instructors, resistance to change of culture and adoption of new teaching modes was found to be very persistent. Our universities have considerable autonomy from the provincial government, and instructors and their faculty associations are able to exert pressure to maintain current models or resist new pedagogical innovations that may require additional effort or new skill development on their part. As has been described in Chapter 6, this autonomy has its roots in constitutional arrangements between the provincial government and the universities. Unlike the college sector, which is governed as a sector under legislation, the government in Ontario engage with universities individually, as they are "legally independent, not-for-profit corporations" (Trilokekar et al., 2013, p. 34). As this governance structure makes it very difficult to implement policy change, historically the universities have been able to set their own strategic paths with little intervention from the government. This has been particularly true with regard to online learning capacity development, as a delayed provincial response to global policyscape resulted in institutions establishing their own approach and resourcing strategy. Thus Ontario universities were able to protect their own autonomous internal functions, undertake entrepreneurial strategies only if seen to be clearly advantageous, and decrease the priority of MTCU directives that did not align with their existing strategic trajectory.

The carrot of one-time funding for course development and an opportunity to market online courses proved attractive. It generated competition within the sector for resources and rank, though data collected in this study revealed that universities continued to plot their own individual approaches to adoption of online learning strategies. These strategies were particular
to their specific characteristics, for example proximity to urban areas, size of the university, and whether more research-focused or teaching-focused. In addition, the autonomy of Ontario universities has allowed a measured approach to integration of new approaches, with careful consideration of operational and sustainability questions. The result has been a high level of pragmatism regarding alignment with existing program goals and purposes, and reluctance to work collaboratively with other universities unless clear benefits were evident. The overall approach has been one of exploratory consideration of the practical value of new online learning opportunities, while mitigating of the impact of the "disruption" theme being emitted on the global stage.

**Differentiation.** A second, related factor that has had an impact in terms of path dependency is the promotion of a differentiation agenda within the sector. In this regard the universities are quite unlike the college sector, which has greater homogeneity operationally as a result of common governance structure (Trilokekar et al., 2013, p. 34). Universities have been able to differentiate themselves from colleges, which do not play a feeder function as they do in the USA system. They are also distinguished from one another in their response to regional context, and the constraints and opportunities presented by their size, location and focus.

This differentiation across the sector and between institutions has been described by some participants in this study as a barrier to implementation of the online learning strategy directives proposed by the province. The desired economies of scale through shared course offerings and expanded credit transfer were deflected in favour of a sectoral differentiation agenda by the COU (2011). This deflection was also evident in OCUFA's communication as they advocated for protection of the role of the instructor in both program and modality
decision-making. In a post on their web site it was specifically noted: "We favour a consortium model that allows universities and faculty members to retain control of their own courses, while preserving academic freedom and autonomy in academic planning" (OCUFA, 2013). Both organizations have taken the position that the responsibility for academic program and quality rest with the institutions. This perspective is summed up in an excerpt from a scholarly white paper published by the COU in 2011:

Each institution in Ontario is unique with policies and practices regarding prior learning assessment, points of entry (portfolios, marks, letters of intent), transfer of credit, letters of permission, residency requirements and even minimum grade point averages. All this creates challenges that must be considered as we work toward developing a shared online institute. (Garcia & Albert, 2011, p. 7)

Early resistance to large shared courses and broader credit transfer arrangements resulted in negotiation of key changes to the MTCU strategic direction. The first relates to credit transfer and the new common online course portal functionality. The first significant deviation from the original conception is that formal requirements for institutional participants to accept the credits of other universities have not been imposed. Secondly, the new portal features information on any online courses, including duplicate offerings, across all universities. In this regard it differs significantly from the Ontario college sector model that was originally championed as a solution that could be replicated with the universities. Rather than a single course on a particular topic being funded, and consequently included in the portal, the listings are non-exclusive. Provided they meet the MTCU definition of an online course, all university online courses may be listed, with no reciprocal transfer obligation.

Support for the differentiation agenda is also evident in the outcomes of the formalized
SMAs. In 2014 these moved from the proposal stage to individually negotiated agreements, and set the stage for differentiation across all universities, including their approach to online learning. Several universities, such as Waterloo and Ryerson, profiled online learning as one of their key distinguishing strengths. Small universities, particularly those in the north, have positioned remote learner access and pedagogical innovation related to regional needs as priorities that will differentiate their institution, while allowing them to legitimize online learning capacity development. Others make minimal mention of online learning. Thus both institutional autonomy and differentiated priorities have been factors that have lead to significant path dependency, and tempered the policy discussion related to system-wide adoption of transformative online practices.

A Recipe for Policy-Fail or Constructive Ambiguity?

This study of the online learning strategy implementation in Ontario sector during a period of accelerated policy incubation provides a unique opportunity to observe tensions and processes that might not otherwise be visible or expressed. In this section I will explore two unique aspects of the provincial strategy implementation that have supported an effective research process using a vertical case study methodology. First the study will be discussed in light of its occurrence during a period of turbulent change in the broader elearning policymcape. Secondly it will be considered in terms of the leadership and vision provided by the provincial ministry. These two elements influencing the discussion and negotiations within the policy community were particularly potent in terms of the possibility for a highly dysfunctional outcome.

Turbulence of the digital revolution. As shown in the data collected, the period studied occurred when the global policymcape regarding online learning was highly charged by
the introduction of MOOC models and the widespread promotion of the idea of disruptive innovation. As noted by Siemens (2015), these developments are not in and of themselves revolutionary, but rather are a reflection of an "alpha trend" of digitization of education that is revolutionary in impact. A parallel can be drawn between the digital revolution and a theoretical model used in political science, that of a "transitology." Transitology is a term used to describe the process of change from one political regime to another in a revolutionary context. When applied to educational research, scholars have historically used the concept to explore the impact of a revolutionary period on the social, economic, cultural dimensions of the fabric of society. Typically the focus would be on the paradigm shifts in higher education in such periods, and the response to upheaval that challenges the purposes and structures of higher education. According to Cowen (2000), a period of a "transitology provides a unique 'lightening flash' in which key issues, power, future directions are illuminated.

Borrowing from political science, the intersection of global and local forces manifested in the domain of online learning in Ontario may be seen to have had the same characteristics as a political transitology. Introduction of a new strategic initiative occurred at the peak of the MOOC hype cycle that was especially influential among university academic leaders. At the same time the idea of technology-based disruptive innovation was garnering widespread attention within government policy circles. As discussed previously, rapid acceptance of the validity of online learning, as well as the adoption of neo-liberal perspectives on its use and value, were increasingly evident in white papers and reports, research literature, and in popular culture at the time. Finally, this dynamic and influential policiescape was further escalated in the Ontario context as the government pushed out a program to invest millions of dollars (MTCU, 2014), in an online learning strategy to be implemented in an environment that had
previously experienced a policy vacuum in this area. The combination of factors together caused a form of "transitology," a situation in which tensions between influential emitters from the broader policy scape clashed with the institutionalized practices of a sector that had traditionally been risk averse, operationally autonomous, and culturally resistant to change.

Leadership churn. Secondly, this heightened activity in global policyscape coincided with an unusual sequence of events in terms of leadership continuity at the MTCU. As noted in Chapter 5, during the period of the study, there were three premiers, each of whom had a different approach to moving the project forward. Minister Milloy initially engaged a special advisor with connections in Contact North to prepare a feasibility report. Minister Murray issued a discussion paper and held a series of community consultations to discuss his ideas for "revolution." Dalton McGuinty, who was the champion and original proponent of new Ontario Online Institute, resigned mid-way through the process, and Murray's resignation also soon followed. The funds had been committed, yet years of planning and consultation had passed. There was both a sense of urgency, and a sense that the province would have to "hurry up and wait" (Weingarten, 2013, p. 91) while further gestation occurred. Toronto Star headlines announced with prescience "Long-promised Ontario Online Institute still far from launch" (Brown, 2012), and indeed the province waited until 2014 for announcement under the leadership of Minister Brad Duguid. As reported by interviewees, during this period of leadership churn there was notable inconsistency in the strategic vision expressed in public communication.

In combination with the high level of global attention to the transformative potential of online learning, this ambiguity of intentions within the provincial government left much room for speculation. Unless a solution acceptable to the key stakeholders across the province was
put forward, the result would have been an extreme case of "policy-fail" from which it would be difficult, if not impossible, to recover. This precarious situation increased the pressure on the MTCU to deliver a plan that would not be rejected, but rather had the potential to be interpreted as accommodating the needs of all concerned. During this pivotal period of highly dynamic and compressed policy development, the conflicting paradigmatic perspectives of the key stakeholder groups were thrown into high relief.

**Saved by constructive ambiguity.** What could have been a massive failure in policy implementation, given the inherent tensions between various paradigmatic viewpoints, fortunately lacked the specificity that could draw outright critique or rejection. The plans that were finally announced by the MTCU presented only a highly symbolic framing of the structure and implementation of the new strategy. Whether by design or by happenstance, this lack of specificity brought about a form of constructive ambiguity, allowing for a range of interpretations as to how the implementation could and should occur. Rejection was also avoided by pairing of this eventual announcement of the Ministry directives with substantial financial incentives. Responsibility for that implementation was passed to the COU as an intermediary organization representing the interests of the sector, with only high-level guidelines and principles being provided by the MTCU. Ambiguity that had begun with the publication of a “discussion paper” continued through the negotiations occurring within the COU as to what framework might be used to begin to flow resources to the universities. Even the MTCU-specified funding criteria such as scalability, collaboration, and credit transferability allowed flexibility of interpretation. Ambiguity as to the specific goals, absence of specific instrumentation to achieve those goals, and the lack of an evaluation framework to measure success left plenty of room for negotiation and for autonomy.
Whether interpreted as lack of leadership, or as constructive ambiguity, the result was an urgent need for an inductive negotiation process to reach a viable interpretation of ministry directives. At all levels of the implementation staircase, it was necessary to navigate the turbulence created by the active policyscape in the absence of a clear provincial roadmap. This state of affairs forced leaders within the COU and at the universities to quickly and insightfully interpret the broader policyscape, make meaning out of the internal and external factors, and filter the narratives at play in the popular media. The MTCU negotiated with the COU, while the COU negotiated with its members and other stakeholders in university sector. Just as the global stage reflected a breadth of approaches, a range of paradigms were also reflected in the responses of policy network actors and agents within institutions that would be impacted by the outcomes. Fortunately, the emergence of common ground during this compressed incubation period was aided by flexible interpretation of models and directives the MTCU had borrowed from the broader elearning policyscape. As noted in Pinheiro et al., (2012), universities can take advantage of ambiguity of intention and ambiguity of meaning to navigate complex tensions between external and internal needs and functions (p. 40-41). In the case explored in this thesis, constructive ambiguity served as a negotiating tactic that allowed diffusion of potentially contentious issues. As a result, there were some gains in alignment across the steps of the policy implementation staircase in several areas, including flexible value propositions, investment in capacity extension, and development of foundational infrastructure.

Overall the policy development process demonstrated the ability of government and Ontario universities to inductively negotiate strategies that aligned with espoused values across multiple levels of the implementation staircase. This alignment was particularly evident in influential emitters' messaging regarding student access and improvement of student learning
experience, reflecting values linked to learner-centred, market- and pedagogy-based paradigms. Emergence of this value proposition allowed selected individual universities across the province to extend their capacity by leveraging government funding for development of high quality online courses and reusable modules. Targeted funding acted as an irresistible catalyst for the universities and lent legitimacy to pursuit of the option of online course and program offerings. Further, for many institutions, increased attention to online learning capacity development was evident not only in the response to funding programs, but also within their ongoing strategic planning.

Importantly, the flexible interpretation of criteria for funding allowed the ministry, the COU, and the institutions to address their priorities by accommodating both popular and autonomous functions. For example, the broadening of funding targets to include areas such as specialized courses, modules, and graduate programs aligned with the operational needs identified in the universities' academic plans. However, ambiguity in communication allowed the upper levels of the administrative hierarchy to also gain support in terms of the benefits to the public. Thus needs ranging from the high level priorities of the provincial government down to the practical operational concerns of universities could be addressed.

Finally, despite initial resistance, the implementation strategy resulted in development of foundational infrastructure in the form of a course discovery portal. This type of system-wide infrastructure improved the visibility of available online courses as a student service and furthered the provincial priorities with regard to popular functions. Given the constraints of government funding cycles, the initial development and launch was modest due to short timelines. However, this tangible outcome and the participation of all provincial universities was a significant milestone and extension into additional services and support areas are in the
planning stages.

In summary, it is clear that during the focus period of this study there was a high level of turbulence both internal and external to the Ontario university landscape, as well as rapid change of leadership. The ambiguity as to the specific goals and implementation strategy for the provincial initiatives provided a unique opportunity for negotiation between levels in the sector. Positive outcomes included alignment of value propositions, capacity extension, and flexible interpretation of criteria for success. As noted above, a substantive outcome was creation of a course discovery portal as a first modest step toward collaborative efforts. The process of negotiation of these the policy directives in a compressed time has also provided a unique opportunity to deepen our understanding of the points of paradigmatic alignment and tension across key stakeholder groups. The importance of understanding the process of negotiating these divergent paradigms will be discussed in the following, concluding section of the chapter and thesis.

**Conclusion**

These findings and results to date signal a migration of eLearning from the periphery toward the core of university mission-related activities, yet are far from the original disruptive vision put forth by the MTCU. During the early policy development process new issues and tensions arose through the negotiation process. Overall, the borrowing of models from other jurisdictions and the potential for a resourcing advantage was constrained due to contextual factors and path dependent characteristics of the system as a whole. Based on the findings of this study, three key examples of emergent challenges to future policy development informing the conclusions are summarized in this section: *inequities in participation*, *limited market benefit*, and *sectoral competition*. The importance of balancing external influencers from the
broader policyscape and the internal path dependencies is then discussed. The thesis concludes with recommendations for further research.

**Inequities in participation.** Low levels of involvement and lack of resources among smaller, remote or teaching-focused institutions may potentially have a marginalizing impact. This may occur specifically in terms of their participation in online learning domain, as budget concerns and lack of staff and instructor capacity may prevent these universities from leveraging this opportunity to provide value in underserved regions. Given the existing enrolment challenges in less urban areas, this missed opportunity may potentially impact their future effectiveness. In terms of policy implications, continuation of a solely competitive model for accessing resources may compromise the social and political value of supporting distribution of resources equitably across a large jurisdiction. Exploration of alternative models would be valuable.

**Limited market impact.** In spite of the early focus on economic growth opportunities and new marketization models by the MTCU, to date the provincial elearning strategy discourse has been situated entirely within the regional context, reinforcing existing processes. While the rhetoric of disruption and innovation has been prevalent, in fact there was little change in terms of the business models and nor growth in markets available to Ontario universities in the initial stages. The new portal has been primarily focused on services to current Ontario students, rather than attracting new learners. Thus, from an economic and market growth perspective, long-term financial benefits to the province and to institutions are not yet evident. If economic benefit and market expansion are indeed goals of the government, the policy focus will need to be adapted to emphasize these dimensions.

**Competition rather than collaboration.** During this phase of policy implementation,
internal sectoral competition for new funding took precedence over early notions of collaboration. Rather than seeing efficiency gains through cooperation in this arena, institutions remained in a state of competition for MTCU provided resources and provincial enrolment share. Initiatives and incentives introduced in this phase did not facilitate development of shared services, nor support for the university community members seeking opportunities to work together to address shared challenges. Rather, the opportunity for collaborative work was limited to co-development of digital curriculum and student support resources that are valuable, yet not specifically designed for delivery of online courses. Adjustments to the policy approach are needed if the development of collaborative course delivery, research and innovation networks are to be achieved, as described in the MTCU's overarching model (2013).

The relative importance of these three emergent challenges is difficult to assess as both the goals and any corresponding measureable outcomes for the initiative remain unclear. Notably, the MTCU did not introduce an element of program evaluation to assess the impact of their strategy. Consequently, these issues are thus likely to persist as subjects of discussion in the policy community at all levels within the sector unless clarity of goals and a corresponding strategy to achieve those goals is articulated by the government, or its new arms-length agency, the Ontario Online Learning Consortium. As the discourse continues, achieving a balance between the external influencers from the broader policyscape and the internal path dependencies will depend upon ongoing negotiation of shared goals and reconciliation of conflicting paradigmatic views. The process for resolution of tension and progression on strategy development that has occurred within the Ontario university sector context is depicted graphically in Figure 11.
180

Figure 11. Visualization of the process of elearning strategy and policy development in Ontario.

As shown in this figure, negotiation between levels on the policy implementation staircase in this uniquely compressed context has been critical to achieving institutionalized support at the university level. Symbolic models percolate downward into institutional plans and eventually institutional norms. Funding for curriculum development projects has a reinforcing impact on institutional support and social norms. In the vertical case study described in this thesis, unique circumstances placed the policy development process in an arena where both principles and practice had to be negotiated within a short period of time.

* The Ontario Online Learning Consortium formed in late 2014 as an arms-length agency of the MTCU subsequently replaced the COU in the role of intermediary.
Differences of viewpoint and paradigmatic perspective were thrown into high relief as symbolic models from the global policyscape acted as catalyst for change, while path dependencies and institutional autonomy provided a framework for resistance. In retrospect, it can be seen that the sector was thus situated in a state that could be described as optimal disruption, setting the stage for change. Policy fail was narrowly avoided; yet new issues have surfaced that will need attention and consideration to ensure a continued path of constructive change benefiting the sector as a whole.

**Further research.** This study sets the stage for further research related to these newly emergent issues given the broad national and global interest in the potential for elearning to address common challenges in higher education. Based on the findings of this study and the emergent issues and challenges noted above, three key aspects of policy development process warrant exploration, including the role of community feedback, the potential of alternative incentive structures, and the significance of path dependencies.

**Community feedback and consultation processes.** Policymakers will benefit from exploration of the role of community feedback and consultation processes on reconciliation of diverse paradigmatic models. How can various levels of the implementation staircase be provided with an appropriate voice to inform strategic direction? How can an ongoing iterative process of negotiating shared value propositions be facilitated? What communication strategies promote appreciation of the perspectives and values of various key stakeholders whose support is needed to ensure goals and outcomes are in alignment? Research on processes in other jurisdictions would provide insight into critical success factors in this domain.

**Alternative incentive structures.** The potential for development of alternative, non-competitive models for distribution of funding incentives could increase participation and
ensure inclusivity of all institutions within a system. The current findings of this study suggest that exploration of other models of resourcing will be valuable if a governing agency aims to address overall system goals while remaining committed to regional and institutional differentiation. Alternative policy instruments might be designed in a manner that also takes into account a range of needs and opportunities, rather than being based solely on competitive advantage within the context of an incentive-based funding program.

**Path dependencies.** Further analysis of the impact of path dependencies and historic operational trajectories on inter-institutional collaboration would inform the emergent body scholarly work in this area. Gathering further research evidence could support system level analysis of the potential for shared services, courses, and program offerings. While conceptually appealing, the advancement of consortium-based networks is often impeded by operational and cultural barriers. As noted previously, several scholars have begun to develop models and share insights as to the opportunities for advancing higher education access, quality and cost efficiency through shared elearning initiatives. A more systematic review of the contextual and operational factors influencing outcomes would support effective policy development.

The current findings suggest that further investigation of these three aspects of policy process would be beneficial: role of community feedback, the potential of alternative incentive structures, and further consideration of the significance of path dependencies. In this vein, comparison with policy strategy development and analysis of the dynamics of implementation as it occurs in other systems would be a productive extension of this research.

Overall, this thesis has contributed to the literature through use of a vertical case study to highlight key elements of the policy development process in the highly contentious domain
of elearning. It provides decision-makers with a mapping of the evolving perceptions of the value of elearning, while exploring critical tensions between sociological and economic paradigms. In addition to providing insights into policy process, this study has provided a model for analysis that crosses disciplinary strands in the existing research and provides an integrative approach that takes into account a range of epistemological paradigms. The use of the ideal-type construct in combination with the concept of emitters within a broader policyscape has proved useful in deepening our understanding of the socio-political elements of policy process. This model is transferable and replicable in other contexts, providing a meta-level analysis of tensions and stakeholder interests that is essential to navigating ongoing negotiation and clashing values in the quickly evolving landscape of higher education.

Exploration of these important dimensions of policy process informs our understanding of the balance between the influence of the broader policyscape and unique sectoral needs, benefitting both the Ontario university sector, and the many other jurisdictions navigating the winds of change in post-secondary elearning.
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Melton, J. H., Miller, R. E., & Kumar, A. (2014). (Un)bundled services: a stakeholder’s framework for understanding the impact of MOOC-like, third-party online courses (pp. 4922–4931). IEEE. http://doi.org/10.1109/HICSS.2014.604


Paniagua, V. E. D. (2014). *The quest for accountability in Ontario’s post-secondary education*
sector: An assessment of the transformative power of the multi-year accountability agreements (MYA/MYAAs) [Doctoral Thesis]. University of Ottawa.


Appendix A - References for Public Macro- and Meso-Level Documents

The following documents were included in the Phase 1a data collection and analysis process:


Council of Ontario Universities. (2014). *Request for proposals: Online course and module*
development projects. Retrieved from
https://ontarioonlinecoursecall20142015.wordpress.com/
https://www.ecampusontario.ca/about
formulation in the European Union and the United States: Discursive convergence and
Hampson, K. (2014). Cost and revenue model design for online courses: Frameworks for
http://www.omdc.on.ca/Assets/Research/Research+Reports/eLearning+Industry+Snapsh
Ontario Confederation of University Faculty Associations. (2012). Reality Check: Online
education is expensive when you do it right. Retrieved from http://ocufa.on.ca/blog-
posts/data-check/reality-check-online-education-is-expensive-when-you-do-it-right/
Ontario Confederation of University Faculty Associations. (2013a). Council of Ontario
Universities working to establish new online learning consortium. Retrieved from
http://ocufa.on.ca/blog-posts/universities-blog-posts/council-of-ontario-universities-
working-to-establish-new-online-learning-consortium/
Ontario Confederation of University Faculty Associations. (2013b). COU releases more details
on Ontario Universities Online Consortium. Retrieved from http://ocufa.on.ca/blog-
posts/universities-blog-posts/cou-releases-more-details-on-ontario-universities-online-
consortium/


Rushowy, K. (2012, February 22). Ontario universities should offer three-year degrees, classes
Appendix B - Interview Guide for Phase 1b

Description of process:

The following is a high level outline to the structured interview process undertaken with a population of 5 key informants who have had leadership roles at intermediary organizations in the university sector in Ontario. They were identified based on role participation in the following organizations: Council of Ontario Universities; Ontario Confederation of University Faculty Associations; Ontario Undergraduate Student Alliance; and the Ontario University Council on eLearning.

The interview process had the following aims:

- Confirm identification of key events in the policy development process
- Assess completeness of set of documents analyzed, or solicit additional suggestions
- Validate comparative mapping of dominant themes and viewpoints expressed by various stakeholder groups.
- Gather suggestions of other drivers or models influencing conception of the development of elearning strategy and policy in Ontario (ie what other "emitters" are influencing the Ontario policy scape).

At least one week prior to the interview, key informants were provided with a summary of the document analysis that includes:

- Time line of key events in the policy and strategy development process within Ontario during the period of 2010 to 2015
- List of documents included in the analysis
- Summary of key themes/perspectives foregrounded in the documents, categorized both by stakeholder group and by conception of the goals of eLearning/worldview

Interview Guide:

Example Questions

- Did you have an opportunity to review the documents provided? Could you comment on whether the key events in the policy and strategy development processes described are accurate? Complete?

- Are there any further documents available for analysis that should be considered for inclusion?

- You have been provided with a mapping of dominant themes and viewpoints expressed by various stakeholder groups. Are your observations of the views that have been presented in this sphere the same, or do they differ from what has is reflected in the document analysis?

- Are there additional perspectives, policy ideas, prescriptions or models influencing
elearning strategy development in Ontario that are not captured here? These may come from other groups in Ontario, Canada or beyond.

- Additional thoughts or suggestions?
Appendix C - References for MYAA Document Sources

The following are the source locations and date of retrieval for all MYAA reports that were included in the Phase 2a data collection and analysis process, group by year of report:

MYAA Agreements for 2010-2011
Retrieved June 12, 2014

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<thead>
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<th>University</th>
<th>URL</th>
</tr>
</thead>
<tbody>
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<td><a href="http://www.brocku.ca/webfm_send/20979">http://www.brocku.ca/webfm_send/20979</a></td>
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<tr>
<td>Laurentian</td>
<td><a href="http://142.51.1.171/webfm_send/88">http://142.51.1.171/webfm_send/88</a></td>
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<tr>
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<td><a href="http://www.ryerson.ca/content/dam/about/accountability/documents/MYAARB-2010-2011.pdf">http://www.ryerson.ca/content/dam/about/accountability/documents/MYAARB-2010-2011.pdf</a></td>
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**MYAA Agreements for 2011-2012**  
Retrieved June 12, 2014

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</tr>
<tr>
<td>Lakehead</td>
<td><a href="http://bolt.lakeheadu.ca/~analysis/MYAA_Report_Back_1112_Lakehead_FINAL.pdf">http://bolt.lakeheadu.ca/~analysis/MYAA_Report_Back_1112_Lakehead_FINAL.pdf</a></td>
</tr>
<tr>
<td>Laurentian</td>
<td><a href="http://142.51.1.171/webfm_send/1193">http://142.51.1.171/webfm_send/1193</a></td>
</tr>
<tr>
<td>Ottawa</td>
<td><a href="http://www.uottawa.ca/services/irp/docs/OTTA.pdf">http://www.uottawa.ca/services/irp/docs/OTTA.pdf</a></td>
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<tr>
<td>Toronto</td>
<td><a href="http://www.utoronto.ca/__shared/assets/MYAA_2011-12_Final4830.pdf">http://www.utoronto.ca/__shared/assets/MYAA_2011-12_Final4830.pdf</a></td>
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# MYAA Agreements for 2012-2013

Retrieved June 28, 2014

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<tr>
<td>Lakehead</td>
<td><a href="http://bolt.lakeheadu.ca/~analysis/MYAA_Report_Back_1213_Lakehead_FINAL.pdf">http://bolt.lakeheadu.ca/~analysis/MYAA_Report_Back_1213_Lakehead_FINAL.pdf</a></td>
</tr>
<tr>
<td>Laurentian</td>
<td><a href="http://laurentian.ca/assets/files/2012-13%20Multi-Year%20Accountability.pdf">http://laurentian.ca/assets/files/2012-13%20Multi-Year%20Accountability.pdf</a></td>
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<td>NOSM</td>
<td><a href="http://www.nosm.ca/uploadedFiles/About_Us/Media_Room/Publications_and_Reports/NOSM%20MYAA%202012-13%20FINAL.pdf">http://www.nosm.ca/uploadedFiles/About_Us/Media_Room/Publications_and_Reports/NOSM%20MYAA%202012-13%20FINAL.pdf</a></td>
</tr>
<tr>
<td>Ottawa</td>
<td><a href="http://www.uottawa.ca/services/irp/docs/OTTA2013MYAA.pdf">http://www.uottawa.ca/services/irp/docs/OTTA2013MYAA.pdf</a></td>
</tr>
<tr>
<td>Ryerson</td>
<td><a href="http://www.ryerson.ca/content/dam/about/accountability/documents/MYAA_RB-2012-2013.pdf">http://www.ryerson.ca/content/dam/about/accountability/documents/MYAA_RB-2012-2013.pdf</a></td>
</tr>
<tr>
<td>Toronto</td>
<td><a href="http://www.utoronto.ca/__shared/assets/2012-2013_MYAA5073.pdf">http://www.utoronto.ca/__shared/assets/2012-2013_MYAA5073.pdf</a></td>
</tr>
<tr>
<td>UWO</td>
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<tr>
<td>York</td>
<td><a href="http://www.yorku.ca/president/mya/docs/YORK%20MYAA%20Reportback%202012-13%20Final%20Draft.pdf">http://www.yorku.ca/president/mya/docs/YORK%20MYAA%20Reportback%202012-13%20Final%20Draft.pdf</a></td>
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Appendix D - References for SMA Document Sources

The following institutional Strategic Mandate Agreement documents were included in the Phase 2a data collection and analysis process:

1. Institutional Vision, Proposed Strategic Mandate Agreements - 2012


2. Strategic Mandate Agreements - 2014


Western University. (2014). *Strategic mandate agreement - 2014-2017 - Western University*.


Appendix E - References for Institutional Strategy Documents

The following institutional strategy documents were included in the Phase 2a data collection and analysis process:


Queen's University. (2013). *Senate academic planning task force: Draft report march 2013*. Retrieved from


Appendix F - Interview Guide for Phase 2b

Description of Process

The following is a high level outline to the semi-structured interview process undertaken with a population of 14 Ontario university senior administrative leaders responsible for e-learning operations.

The interview process aimed to explore the following:

- Evidence of symbolic models from influential “emitters”
- Paradigmatic alignment of institutional strategy with government directives
- Operational impact as policy refracted to lower levels in the sectoral hierarchy
- Areas of shift in accepted models, policy, strategy, philosophy or practice observed at the institutional level.

Broad areas for probing included:

- What and how have symbolic models for strategic success been communicated to the interviewees?
- How are a range of strategy paradigms reflected in the planning and operations implemented at the meso level (i.e., institutional patterns) during period of study (before and after the introduction of a MTCU elearning strategy in January 2014?)
- How do senior administrative leaders responsible for institutional elearning strategy at Ontario universities perceive ruptures and continuities between the publicly communicated macro-level government intentions and institutional operationalization of elearning strategies (if any)?

Example Questions:

- What are your perceptions of Government of Ontario, MTCU and/or COU communication regarding provincial online learning strategies? Have you observed increased awareness or response to new policy directives within your institution?

- Are there other sources of leadership/direction influencing your perception of priorities for strategic success?

- Have you observed any shifts in approach or new emphasis on eLearning from your university institutional academic leaders? Any shift in themes regarding institutional opportunities/drivers/purposes/goals for leveraging online elearning?

- Have you observed changes in actual practice/operations/resourcing/roles within their institution since 2010 when the Online Institute was first announced?
• Do you perceive any mismatches in alignment with directives from higher up the “staircase” (i.e., from Ontario government or intermediary organizations such as COU, OCUFA, OUSA, OUCeL)? How does this impact operations?

• What do you think “should” be the priorities?

• What are the key challenges in eLearning strategy implementation (probe three dimensions: cost, access and quality)?

• Observations as to what motivators at the institutional level will influence direction eLearning strategy operational planning going forward?

• What themes are common in institutional discourse (probe common themes such as international influence, attracting new student markets, scalability and innovation, efficiency and productivity, quality issues)?

• Are there additional perspectives, policy ideas, prescriptions or models influencing eLearning strategy development in Ontario that are not captured here? These may come from other groups in Ontario, Canada or beyond.

• Participants will also be asked to confirm data from Multi-Year Accountability Agreement reports for their institution.
Appendix G - Consent Form Examples

Phase 1 Consent:

Project Title: eLearning in Ontario: Responding to the Winds of Change

Researcher:
Laurie Harrison

Supervisor:
Dr. Glen A. Jones

I am asking individuals who, through their organizational leadership roles, have been involved in eLearning developments to provide feedback on the results of recent document analysis I have undertaken in this domain within the Ontario University sector. My goal in this phase of the study is to examine responses to the recent provincial eLearning policy and strategy direction as it is refracted through intermediary organizations. This will support analysis of the dynamic and the impact of the sectoral discourse regarding a provincial online learning strategy in Ontario between March 2010 and December 2014.

The findings of my thesis research will provide policy-makers and institutional leaders with information regarding the evolving perceptions of the value of e-Learning initiatives, and a mapping of a range of viewpoints within the Ontario university system context. As a leader within the sector, you may also benefit through review of the current state of the field of online education, and consideration of the range of strategic orientations that may factor into the effective achievement of institutional and system goals. The study will be conducted under the supervision of Dr. Glen Jones at the University of Toronto.

For this phase of the study, only four participants are being recruited based on their participation in leadership roles within intermediary organizations within the university sector in Ontario. The estimated time commitment for review of materials and the interview is approximately 50 minutes. Summary documentation mapping dominant themes and viewpoints expressed by various stakeholder groups within the university sector will be provided in advance. Your participation is voluntary and you may decline to answer any question or withdraw your participation in the study at any time without consequences. The data collected from the interview process will be anonymized so that you cannot be personally identified. Paper documents will be stored in a secured location in my office at the university. Only I will have access to the digitized interview data and notes that will be encrypted and stored on a secure server. With your permission, I will audio record the interview. Within four weeks after the interview, I will send you an interview summary document and provide you with an opportunity to confirm the accuracy of the summary and identify any errors of fact or interpretation.

You will be able to access to the final report, which will be located in the OISE/UT thesis collection and which can be accessed electronically in the University of Toronto Research Repository (TSpace) at https://tspace.library.utoronto.ca/handle/1807/9944.

If you have any questions related to your rights as a participant in this study or if you have any complaints or concerns about how you have been treated as a research participant, please
contact the Office of Research Ethics, ethics.review@utoronto.ca or 416-946-3273

-----------------------------------------------
I volunteer to participate in the research study regarding the response of the university sector to recent elearning policy and strategy developments in the province of Ontario.

I understand that my decision to participate or not to participate in this interview is completely voluntary.

I understand that I will not be judged or evaluated and at no time will be at risk of harm.

I understand that no value judgments will be placed on my responses to the interview questions.

I understand that my responses to the questions will be kept anonymous and that interview data related to specific individuals or institutions will be presented in such a way so that individuals and institutions are not named.

I agree to have the interview recorded. I understand that I will later be sent a summary of the interview and will have an opportunity to confirm the accuracy of the document and note any errors of fact or interpretation.

I have read the information above and understand what my participation will entail.

__________________________________________________
Participant’s name (printed) and signature                                      Date

Name (printed) and signature of persons obtaining consent

Researcher:
Laurie Harrison
Ph.D Candidate
Ontario Institute for Studies in Education
University of Toronto
laurie.harrison@utoronto.ca
416-978-1703

Supervisor:
Dr. Glen A. Jones
Ontario Institute for Studies in Education
University of Toronto
252 Bloor Street West,
Toronto, Ontario
M5S 1V6
gjones@oise.utoronto.ca
(416) 978-8292

(Please keep a copy of this letter for your records.)
Phase 2 Consent:

Project Title: eLearning in Ontario: Responding to the Winds of Change

Researcher:
Laurie Harrison

Supervisor:
Dr. Glen A. Jones

I am asking university administrators who have been involved in institutional leadership roles related to elearning to provide feedback on their experience and observations of recent developments within the Ontario university sector. My goal in this phase is to examine responses to the recent provincial elearning policy and strategy direction as it is refracted to the institutional level. **This will support analysis of the dynamic and the impact of the sectoral discourse regarding a provincial online learning strategy in Ontario between March 2010 and February 2015.**

The findings of my thesis research will provide policy-makers and institutional leaders with information regarding the evolving perceptions of the value of e-learning initiatives, and a mapping of a range of viewpoints within the Ontario university system context. As a participant in this study you may also gain personal insight through a reflective interview process and your work may be informed by the results of the analysis. The study will be conducted under the supervision of Dr. Glen Jones at the University of Toronto.

Participants in this study are being recruited based on their participation in the Ontario University Council on eLearning annual summer institute within the last three years. The estimated time commitment the interview is thirty to forty-five minutes.

Your participation is voluntary and you may decline to answer any question or withdraw your participation in the study at any time without consequences. The data collected from the interview process will be anonymized so that you cannot be personally identified. Paper documents will be stored in a secured location in my office at the university. Only I will have access to the digitized interview data and notes that will be encrypted and stored on a secure server. With your permission, I will audio record the interview. Within four weeks after the interview, I will send you an interview summary document and provide you with an opportunity to confirm the accuracy of the summary and identify any errors of fact or interpretation.

You will be able to access to the final report, which will be located in the OISE/UT thesis collection and which can be accessed electronically in the University of Toronto Research Repository (T Space) at https://tspace.library.utoronto.ca/handle/1807/9944.

If you have any questions related to your rights as a participant in this study or if you have any complaints or concerns about how you have been treated as a research participant, please contact the Office of Research Ethics, ethics.review@utoronto.ca or 416-946-3273.
I volunteer to participate in the research study regarding the response of the university sector to recent elearning policy and strategy developments in the province of Ontario.

I understand that my decision to participate or not to participate in this interview is completely voluntary.

I understand that my responses to the questions will be kept anonymous and that interview data related to specific individuals or institutions will be presented in such a way so that individuals and institutions are not named.

I understand that I will not be judged or evaluated and at no time will be at risk of harm.

I understand that no value judgments will be placed on my responses to the interview questions.

I agree to have the interview recorded. I understand that I will later be sent a summary of the interview and will have an opportunity to confirm the accuracy of the document and note any errors of fact or interpretation.

I have read the information above and understand what my participation will entail.

__________________________________________________
Participant’s name (printed) and signature                     Date

__________________________________________________
Name (printed) and signature of persons obtaining consent

**Researcher:**
Laurie Harrison  
Ph.D Candidate  
Ontario Institute for Studies in Education  
University of Toronto  
laurie.harrison@utoronto.ca  
416-978-1703

**Supervisor:**
Dr. Glen A. Jones  
Ontario Institute for Studies in Education  
University of Toronto  
252 Bloor Street West,  
Toronto, Ontario  
M5S 1V6  
gjones@oise.utoronto.ca  
(416) 978-8292

(Please keep a copy of this letter for your records)
Appendix H - Sample Extract from an MYAA Report

**Course, Program and Registration Data**
Based on the definitions provided above, provide *University of Toronto's* eLearning data for 2012-2013:

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<th>GRADUATE</th>
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<td>22</td>
<td>47</td>
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<tr>
<td>Number of Ministry-funded, For-credit Courses Offered Through Synchronous Conferencing</td>
<td>2</td>
<td>15</td>
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<tr>
<td>Total Number of Ministry-funded, For-credit Courses Offered in eLearning format</td>
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<td>2</td>
</tr>
<tr>
<td>Number of Ministry-funded, For-credit Programs Offered Through Synchronous Conferencing</td>
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<td>1</td>
</tr>
<tr>
<td>Total Number of Ministry-funded, For-credit Programs Offered in eLearning Format</td>
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<td>3</td>
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<table>
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<td>Registrations in Ministry-funded, For-credit Courses Offered Through Fully Online Learning</td>
<td>3,582</td>
<td>1,482</td>
</tr>
<tr>
<td>Registrations in Ministry-funded, For-credit Courses Offered Through Synchronous Conferencing</td>
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<td>235</td>
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<tr>
<td>Total Number of Registrations in Ministry-funded, For-credit Courses Offered in eLearning format</td>
<td>3,771</td>
<td>1,717</td>
</tr>
</tbody>
</table>
Appendix I - University Sector Shared Online Course Projects - 2013 - 2015

Source:

eCampus Ontario. (2016). ShOCF Course and Module List. Retrieved from:

https://www.ecampusontario.ca/content/shocf-course-and-module-list

<table>
<thead>
<tr>
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<td>2015-14</td>
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<td>2013-14</td>
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<td>Introduction to Psychology I &amp; II</td>
<td>PSYC 1001/1002</td>
<td>2013-14</td>
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<td>Carleton</td>
<td>Introduction à la société et à la culture québécoises</td>
<td>CDNS 2510</td>
<td>2013-14</td>
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<td>ALDS 1001</td>
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<td>MATH 1107</td>
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<td>PSYC 2400</td>
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<td>STAT 2606, STAT 2607</td>
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<td>2014-15</td>
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<tr>
<td>Carleton</td>
<td>Structural Equation Modeling</td>
<td></td>
<td>2014-15</td>
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<td>Carleton</td>
<td>Big Digital History: Data Mining &amp; Visualization for Historians</td>
<td>HIST 3907o</td>
<td>2014-15</td>
</tr>
<tr>
<td>Carleton</td>
<td>A Series of Modules on Children's Rights (Module)</td>
<td></td>
<td>2014-15</td>
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<tr>
<td>Carleton</td>
<td>R for Biologists (Module)</td>
<td></td>
<td>2014-15</td>
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<td>Carleton</td>
<td>Fundamentals of Polyhedral Combinatorics (Module)</td>
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<tr>
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<td>Introduction to Computer Programming and Problem Solving</td>
<td></td>
<td>2015-16</td>
</tr>
<tr>
<td>Carleton</td>
<td>Introduction to Indigenous Studies</td>
<td></td>
<td>2015-16</td>
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<td>Carleton</td>
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<td>2015-16</td>
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<tr>
<td>Carleton</td>
<td>Criminal Behaviour</td>
<td></td>
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<td>Experiential Learning (Module)</td>
<td>2015-16</td>
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