

Strategic Planning for Distance Education

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INTRODUCTION

Higher education has recently witnessed an unprecedented expansion by conventional universities to support the distance delivery of instruction. With this, there has been an introduction of new institutions with a sole focus on distance education, accompanied by a developing acceptance of degrees achieved outside of the conventional classroom and campus environment. Each of these shifts has altered the foundational frameworks on which the administration and management of institutions of higher education in the United States and around the world have operated and relied. No longer can we depend on the conventional "wisdom" of classic institutional administration to ensure our success in the future. And as Barker (1993) reminds us, when a paradigm shifts, everyone (even those who have been extremely successful in the past) goes back to zero.

Reacting to the current and upcoming changes in higher education will not, however, guarantee success. And since no institution can accurately predict the future, those that will lead in the upcoming decades will be those institutions that can create the future—those that can create the desired changes and offer learners the knowledge and skills necessary for making a contribution and gaining prosperity (Hamel & Prahalad, 1994; Kaufman, Watkins, & Leigh, 2001; Mitroff, Mason, & Pearson, 1994). In this chapter we suggest a practical and pragmatic framework for the planning and achievement of beneficial results both now and in the future (Watkins, Triner, & Kaufman, 1996). This framework, however, lies beyond the boundaries of the conventional thinking within higher education. It does not always fit with "how we have always done it around here" and will likely challenge many of the "truths" on which many institutions have built their past success. And yet, without a new perspective on defining and achieving success in the new age of distance education, many institutions of higher education will not be able to compete.

THE CALL FOR DISTANCE EDUCATION

When education professionals (trainers, professors, instructors, instructional designers, etc.) hear, "We need a distance education program," their first impulse is to search through course curricula to determine which courses can be easily translated into online video, audio, or digital formats. While rarely questioning the requirement and/or usefulness of distance education, "all too often those charged with setting up a distance education system are not given the choice to recommend against it" (Rumble, 1986). Further, Rumble (1986) urged educators to understand that just because there are education problems that may be satisfied by distance education methods, this does not necessarily mean that distance education is the best choice for addressing them. Fortunately, educators today have tools available to them that reduce the possibility of implementing distance education as an inappropriate response to institutional problems or opportunities. Devoting time to a rigorous needs assessment is a practical way of justifying all actions that follow the request for distance education—or any other solution in search of a problem (Kaufman, 2000).

Before your institution elects to invest financial and time resources in a distance education program, a rigorous needs assessment may justify the decision and prepare you to make the difficult decisions that follow (Kaufman & Watkins, 2000; Kaufman, Watkins, & Leigh, 2001; Watkins & Kaufman, 1996). Today's educators frequently feel pressured to implement solutions prior to justifying their actions by showing that all stakeholders are likely to receive some benefit. Like in corporate settings, educational institutions frequently leave few incentives for the educators to step back and analyze all the necessary information before making complex decisions. This lack of effective strategic planning aligned with front-end assessment is unfortunate because, by the time the impact of a possibly ineffective intervention (e.g., distance education) is known, the institution may well have sustained damage and/or the ideal time for addressing the problem/opportunity has passed (Saba, 1999; Watkins, in press; Watkins & Corry, 2002; Watkins & Kaufman, 2002).

PROACTIVE CHANGE

The institutions that will lead distance education in the future will not address the changing realities of education from a reactive perspective. Though common in the two worlds of business and education (Haeckel, 1999), the tactic of waiting to respond to the actions of your competitors can be a death sentence in today's educational marketplace. Yet predicting the future is not a science. So how will leaders in distance education ensure a useful and successful future? They will create it! (See, for instance, Kaufman & Lick, 2000; Lick & Kaufman, 2000–2001).

Proactive change creation moves institutional planning and needs assessment away from a responsive mindset to one focused on adaptability and creation (see Table 34.1). This change in perspective is essential for determining if and when distance education (or any new educational program) may be appropriate for an institution.

Success in the future is likely to be dependent on the ability of an institution to create the future they want, as opposed to reacting what others have produced. As witnessed in many industries throughout the past, organizations that can create the market they want have a definite competitive advantage. In higher education, we can identify a similar trend, with institutions such as the University of Phoenix, UKOU, and Nova Southeastern University creating markets for distance education and then finding success in meeting the desires of those markets.

TABLE 34.1
Change Creation and Change Management

| <i>Change Creation</i> | <i>Change Management</i> |
|---|--|
| Proactive | Reactive |
| Being pursued | Catching up |
| Setting the standard | Trying to be competitive |
| Leading | Following |
| Long-term focus | Short-term focus (quick fixes) |
| Vision-driven to add value to all stakeholders | Driven by external events |
| Internal planning for a better future | Externally imposed disruptions |
| Strategic | Tactical |
| Focuses on all of the institution plus external clients and society | Focus on parts of the institution |
| A system approach | A systems approach |
| Future-creating organization | Responsive and resilient organization |
| Learning organization | Organizational learning |
| Works to reinvent a new corporate culture | Works within the current corporate culture |

Note. From "Mega-Level Strategy Planning: Beyond Conventional Wisdom," by R. Kaufman and D. Lick, 2000, in *Technology-Driven Planning: Principles to Practice*, edited by J. Boettcher, M. Doyle, and R. Jensen. Copyright 2000. Adapted with permission.

NEEDS ASSESSMENT: A MODEL FROM THE LITERATURE

A pragmatic needs assessment (Kaufman, 1992, 1998, 2000) will identify, prioritize, and justify the closure of societal, institutional, and individual needs (i.e., gaps in results). Although there are many models for conducting a needs assessment,¹ arguably the most fashionable models are those of Rossett (1987),² Robinson and Robinson (1995), Mager and Pipe (1997), and Kaufman (1992, 1998, 2000). Each of the models can be used effectively to provide educators with insights otherwise missing from the decision-making process. Though the Kaufman model, in particular, provides a rigorous process that aligns strategic planning, tactical and operational planning, and needs assessment processes with a focus on societal and organizational value added. These alignments, we suggest, can be of great advantage when making and justifying difficult decisions regarding the future of distance education in any institution. The needs assessment procedures suggested below represent a blend of strengths from a variety of assessment models yet are structured within the Kaufman framework.

The pragmatic needs assessment we propose for effective needs assessment and decision making are based on three fundamental principles:

Distance learning is a means, not an end. A practical and effective needs assessment differentiates between ends and means. Ends are the results of all that your institution does and delivers. Means are the ways in which results are obtained (Kaufman, 1992, 1998, 2000). Distance learning is a means for achieving institutional results. We should first focus on the ends required by the institution for long-term success (based on their contribution to both the organization and the external stakeholders) before we decide that distance learning is the most effective and efficient means for achieving these ends.

¹See Watkins, Leigh, Platt, and Kaufman (1998) for a comparison of alternative needs assessment models in terms of what they deliver in scope and content.

²Though there have been serious challenges to "training needs assessment" based on the fact that, because of their target organizational level, they can be wrong 80–90% of the time. This is a potentially serious problem (Triner, Greenberry, & Watkins, 1996).

All results are not the same. Institutional results can be differentiated depending on their primary client and beneficiary (Kaufman, 1998, 2000). Many institutions are proficient at analyzing their inputs and processes yet have spent far less time differentiating the results they lead to. By differentiating among related results we can ensure that all institutional *products* and *outputs* are aligned with the desired contributions (*outcomes*) of the institution to its external clients and community. Institutions should seek to link the products they produce with the outputs they deliver and the outcomes that result, thus aligning Micro-, Macro-, and Mega-level planning and assessment (Kaufman, 2000; Kaufman, Watkins, & Leigh, 2001).

For effective needs assessment, "need" should be treated as a noun and not a verb. In the context of a needs assessment, the distinction between "need" as a noun and a verb is vital. By electing to refer to a need as a gap in institutional results (a noun), you can avoid the alluring trap of selecting solutions prematurely, such as distance learning. Being able to identify, prioritize, and justify interventions and expenditures on the basis of gaps in results (rather than desired interventions) is the reward for this slight adjustment to your vocabulary. As for those individuals who insist on using "need" as a verb, you will undeniably hear comments like "We need a distance learning program" long before any difference between desired and current results has been identified.

Having stated these fundamental principles, we may begin to discuss the procedures for effectively determining if and when a distance education program may be appropriate for your institution.

STEP 1: IDENTIFY AND ALIGN THE INSTITUTION'S VISION AND MISSION

Step 1 can (but shouldn't) be an "additional task" for many educational institutions. Although most institutions today have multiple mission statements to include in their strategic plan, such as statements of goals, values, principles, and visions (Kaufman, Stith, Triner, & Watkins, 1998), rarely are these the useful documents they could be for directing decision making (Kaufman, 2000). Departments and units often have their own missions, which may or may not be in alignment with the larger institution's vision of the future. How will the mission of a potential distance education program facilitate the vision of the institution? Will the mission of the distance education program be derived from the vision of the institution or will the vision be strained to incorporate the program?

A challenge for educators is not only to identify the missions of departments, schools, colleges, businesses, and so on, but to ensure that all these missions are aligned and contribute to the success of the overarching organizational entity and society at large. Covey (1996) stated that "total organizational alignment means that within the realities of the surrounding environment, all components of your organization—including your mission, vision, values, strategy, structure, systems, individual styles and skills, and especially the minds and hearts of your people—support and work together effectively for maximum performance". For institutions entering a needs assessment, these alignments are essential for defining the desired—or required—results (as well as optimal process efficiency and effectiveness).

If any institutional mission (or even the objective of a distance learning program) does not contribute to the achievement of the overall vision (best set in measurable yet ideal terms), then this mission should be revised before any interventions are implemented. Interventions not linked to the aligned institutional ideal vision and mission objective may lead to inappropriate and/or damaging results (Kaufman, 1998, 2000). The implementation of a distance learning

program should instead deliver value-added results for learners and the community. This alignment is what links programs to the attainment of institutional objectives and ensures that they are not implementing solutions to nonexistent problems.

Your institution may be lacking a vision or a mission that sets measurable performance criteria for success (Abrahams, 1995; Byars and Neil, 1987; Covey, 1996; Garratt, 1995; Nanus, 1992; Senge, 1990). If so, then it is an imperative for effective decision making that these be established so that all educational programs know where they are going and how to tell when they have arrived. Often institutional and program objectives are not written with measurement criteria included. Measurement criteria will be essential in the third step of the needs assessment, in which needs are prioritized and selected for closure.

Beyond the alignment of the institutional vision and mission, educators should utilize environmental scans and market analyses to validate the direction of the institution (Willis, 1992, 1994) and further ensure that the organization and its clients are consistently moving toward adding measurable value to learners, faculty, and our shared society (Martin, 1993; Parston, 1997; Pava & Krausz, 1995).

STEP 2: IDENTIFY THE NEEDS

Needs are discrepancies between current results and the results required for the accomplishment of the institution's vision, mission, program objectives, and individual and team objectives (Kaufman, 2000). Identifying needs requires both the information obtained in step 1 (the results the institution must accomplish for success in the future) as well as the collection of additional data regarding current performance and the state of the institution. It is common for a needs assessment to both utilize institutional data available in existing files, accreditation reports, and other resources, as well as opinion data through the interviews, questionnaires, focus groups, or other procedures to supplement the findings (Willis, 1994, p. 10; see also Willis, 1992). The combination of both "hard" and "soft" data, as well as qualitative and quantitative data, is essential in determining if distance education is right for your institution (see Table 34.2).

The Organizational Elements Model (OEM) can be a useful tool for organizing the information you collect. The OEM differentiates five levels of institutional planning and assessment:

Mega-Planning and assessment whose primary client and beneficiary is society and whose results are termed "outcomes."

Macro-Planning and assessment whose primary client and beneficiary is the institution and whose results are termed "outputs."

TABLE 34.2
Example Data Collections Tools and Techniques for Each Data Type

| | <i>Hard</i> | <i>Soft</i> |
|--------------|--|--|
| Quantitative | Performance data Budgets | Likert-type scale surveys ^a Performance ratings |
| Qualitative | Focus groups Analysis of professional list serve Multi-source performance observations | Opinion surveys Individual interviews Single-source performance observations |

^aThe results of Likert-type scale surveys are often mistakenly taken as hard data because they are in quantified form. This is a good example of why we should consider data on both dimensions (hard-soft and quantitative-qualitative), for a single dimension may lead to confusion, use of inappropriate statistical techniques, as well as incorrect conclusions.

TABLE 34.3
Examples of Hard and Soft Data in Relation to the Organizational Elements Model

| <i>Level</i> | <i>Hard Data</i> | <i>Soft Data</i> |
|-------------------------------------|---|--|
| Mega (societal value added) | Ideal vision Student and faculty safety | Student quality of life Continuing taxpayer satisfaction with education |
| Macro (organizational payoffs) | Mission objective accomplished | Executive management satisfaction and perceptions of value |
| Micro (individual and team results) | Operating costs Individual/team performance | Individual/team morale and perceptions of value Learning/learner mastery gains Learner satisfaction with what has been learned |
| Process (methods and means) | Cycle time Length of time taken on a course topic Number of overheads used in instruction Use of computer-driven instruction | Learner "attendance" and participation Learner satisfaction with the learning processes |
| Input (resources and prerequisites) | Resource availability Resource functionality | Resource adequacy Resource timeliness |

Micro—Planning and assessment whose primary clients and beneficiaries are the individuals and teams within the institution and whose results are termed "products."

Process—Planning and assessment whose primary focus is on institutional processes and activities.

Inputs—Planning and assessment whose primary focus is on resources and assets.

With the OEM as a guide, institutional data should be collected that reflect each of the interdependent levels (see Table 34.3 for examples).

Examination of and participation in all five elements of the OEM allow educators to gain a systems view of their institution, external clients, and societal context and realities. Decision makers are not limited to a Macro (organization-wide) view, nor a Micro view (i.e., of sections and/or departments) when they apply the OEM.

The Mega level of the OEM adds a stakeholder, society, that has traditionally been forgotten or assumed in the development of distance education programs (Kaufman, 2000; Kaufman, Watkins, & Leigh, 2001). Not only is society as a whole a beneficiary of that which an institution does and delivers, but for many institutions (especially K-12 schools and universities) society is the primary financial supporter of their efforts. The application of this strategic approach ensures that society is not forgotten in the needs assessment or in the possible implementation of a distance learning program.

STEP 3: PRIORITIZE AND SELECT NEEDS TO BE CLOSED

Prioritizing and selecting the needs—remembering that they are gaps in results—to be closed is essential to the success of any institution. Comparing the cost of closing the gaps and the cost of not closing the gaps will be the center of this analysis. In this step of the assessment, collected data will drive the decision making. The extent to which data are collected and analyzed will have two effects on the quality of the needs assessment: (a) An extended period of data collection can negate the timeliness of the assessment, and (b) not enough supporting

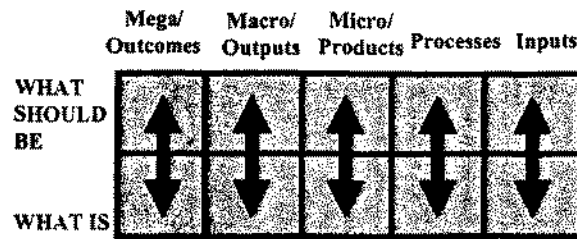


FIG. 34.1. The organizational elements model as it relates to needs assessment. (See Kaufman, 1992, 1998, 2000, and Kaufman, Watkins, and Leigh for a further explanation of the model.)

data can invalidate the results of the assessment. The context of the performance problem (i.e., the reason why distance education is being considered) within your institution should facilitate the balancing of these two variables.

The cost of not closing the gaps is essential consideration in the third step of the assessment and unfortunately is often neglected during application. The cost analysis of problems can keep you from enacting a \$10,000 distance learning solution to a \$500 performance problem (and economics of scale can further complicate this issue). Providing guidance on the procedures for this analysis is, however, difficult because of the specifics of each institution. A smart starting place for the analysis of the cost of not closing the gaps is to look at the elements previously used to fill in the OEM in step 2 (Kaufman, Watkins, & Sims, 1997). It will be worth your time to at least estimate the costs of each gap between what is and what should be (see Fig. 34.1).

The cost of closing the gaps is more familiar to most educators and educational administrators. To complete this analysis within step 3, you must enter step 4. A Cost-Consequences Analysis (Kaufman & Watkins, 1996; Kaufman, Watkins, & Sims, 1997; Muir, Watkins, Kaufman, & Leigh, 1998) is a tool that provides educators with a coarse-grain examination of the cost of closing the gaps, and keeps the needs assessment within the context of the OEM. The Cost-Consequences Analysis incorporates, as suggested by Rumble (1986), the cost-efficiency, cost-effectiveness, and cost-benefit analyses.

STEP 4: IDENTIFY SOLUTION REQUIREMENTS AND ALTERNATIVE SOLUTIONS

Before you leap forward to the identification of alternative solutions—unfortunately the place where most programs begin—you should define the solution requirements. These requirements will establish the criteria by which each alternative solution will be judged. Specific solution requirements will facilitate the listing of alternative solutions and the selection of the “best” solution(s). The solution requirements identified should include time, costs, available resources, and necessary results.

We suggest that at least two or three alternatives be identified for any intervention. Most problems have more than one possible solution. A distance education program may be a feasible solution for most institutions, but other alternatives exist and should be sought out. Alternative solutions should be identified despite limitations that may bar them from being selected for implementation. In addition, identify the pros, cons, and costs for each possible solution. This is the time to get innovative. Creating an extensive list of alternative solutions is a necessary step on the way toward selecting the most effective and efficient solution. The effort you put

into thoroughly analyzing all the possible solutions for any problem will pay off when you make decisions and search for confidence that you made the right decisions.

STEP 5: SELECTING THE SOLUTION(S) FROM AMONG THE ALTERNATIVES

Using the analysis of steps 3 and 4 and ensuring alignment with steps 1 and 2, you now proceed to make a decision. Deciding upon a single solution may or may not be advisable. For many problems or opportunities, a combination of alternatives may yield the best results. Pressures from above (claims that, "we need a distance learning program") and costs alone should not drive the decision but rather, be a piece in a dynamic process. The needs assessment provides you with the essential information for identifying the "right" solution for your institution. Having systematically implemented a needs assessment process will add validity, usefulness, and confidence to your decisions.

The needs assessment process described in this chapter offers several distinct advantages for institutions that implement it with rigor:

- 1) The process is driven by an ideal vision (Kaufman, 1992, 1998, 2000) at the Mega level.
- 2) This vision is a statement framed in measurable terms of the kind of world we want to create for tomorrow's child, and it embodies all the elements of a society or community so that institutional planning and assessment can begin where diverse communities find commonality rather than differences.
- 3) Decisions are based on attaining measurable results for individuals, the institution, and the society or community.
- 4) The rigor of the process can be adjusted for different contexts and institutional constraints.
- 5) Information from the assessment will determine performance criteria and evaluation criteria.
- 6) The process leads toward alignment of all that the institution uses, does, produces, and delivers with valuable results for the society or community.

These advantages are invaluable, especially when a distance education solution has been prematurely prescribed. Since educators are increasingly being held accountable for the results of their efforts, time should be taken to assess any performance solution before implementation. In many cases, probably, a distance education solution will be justified when the needs assessment is complete. The accessibility and reduced long-term cost of distance education programs make them viable alternatives for meeting many institutional objectives. A rigorous needs assessment process can provide a level of assurance that a distance education program will both meet these objectives and move the institution and the community toward the achievement of their vision.

When through rigorous needs assessment and strategic planning an institution determines that distance education is the most effective and efficient means for achieving specified results, it will have many good resources available for learning how to complete the tactical planning and successfully implement the new program (see Chapter 40; see also Hamel & Prahalad, 1994; Mitroff, Mason, & Pearson, 1994; Pfeiffer, Goodstein, & Nolan, 1989).

FUTURE RESEARCH IN PLANNING FOR DISTANCE EDUCATION

The recent growth and prosperity of distance education is unlikely to continue into the future if educational institutions are not dedicated to adding value to lives of learners and communities (Kaufman & Watkins, 2000). If any educational institution continues to focus on achieving

TABLE 34.4
An Analysis of Distance Education Delivery Systems

| | <i>Conventional Instruction</i> | <i>Classic/Historic Distance Learning</i> | <i>Current Distance Learning</i> | <i>Future Distance Learning</i> |
|---|---|---|---|--|
| Is it learner, teacher, organization, or society focused? | Teacher and organization focused | Learner focused | Learner and organization focused | Society organization, and learner focused |
| Is it content driven or driven by the usefulness of what is learned? | Content driven | Content driven | Content delivery driven (see Saba, 1999) | Usefulness driven |
| Are needs identified? Are needs assessed? Are needs assessed as gaps in result? | Needs assumed | Needs assumed | Needs assumed | Needs formally determined as gaps in results |
| Are the courses/programs linked to external usefulness? Are the courses/programs linked with other learning opportunities? | Usefulness assumed | Usefulness assumed | Usefulness assumed | Usefulness linked to external value added |
| Are the courses/programs delivered at an institution or at a remote site, including one's home or workplace? | Institution | Remote site or home | Remote site or home (see Matthews, 1999) | All sites possible (see Welsh, 1999; Moore & Kearsley, 1996) |
| Are the courses delivered using conventional means, telephone, books, and/or workbooks, video, computer, web? What are the degrees of freedom for the delivery? | Conventional means with some audio-visual support (see Duning, 1987). | Video, telephone, correspondence materials/books and workbooks (see Matthews, 1999; Moore & Kearsley, 1996) | Computer, web, some video | All means possible |
| Is the content of the courses/programs designed by using a performance system or instruction system process? | Rarely | Rarely | Some of the time | Always |
| Is there open interactivity between learner and instructor/deliverer? Does the learner get immediate feedback concerning performance? | Some of the time | Rarely | Some of the time | Always when appropriate |
| Are the courses/programs evaluated for return on investment for the learners, the designers/deliverers, the institution, or society? | Return on investment assumed | Return on investment assumed | Return on investment for learners and sometimes the organization (see Moore & Kearsley, 1996) | Return on investment for all |

Note. From "Assuring the Future of Distance Learning," by R. Kaufman and R. Watkins, 2000, *Quarterly Review of Distance Education*. Copyright 2000. Reprinted with permission.

results only at Micro and Macro levels (at best), it will eventually lose out to competitors whose mission is to give learners the skills and knowledge they require to attain long-term success and a high quality of life. Yet, in order for institutional planning to be prepared for these new requirements, the educational paradigms that have brought success in the past must be reviewed to determine their likely effectiveness today and tomorrow.

The transformation of future planning in distance education should be considered within the context of the history of distance education (see Table 34.4). Although some trends are more evident in the literature than others, a composite of planning and assessment within distance education offers many issues demanding research, including these:

- What constitutes a useful distance education program?
- What constitutes an effective distance education course or degree program?
- How do institutions validate decisions regarding the implementation of distance education?
- How can educational institutions be responsive and responsible—maintain their adaptability and create the future they and their community desire?
- What happens to distance education programs when technologies drive the decision making rather than adding value to the lives of learners?
- When distance education is determined to be the “best” solution for an institution, how can it design effective and efficient systems?
- How are effective and efficient distance education systems managed.
- How can a distance education program or curriculum be shown to add value measurably to internal and external clients.

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