

Making ODL viable: A model of shared services in the Caribbean

Formal Education: Technologies for Scaling up ODL programmes

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Introduction

One method of meeting the increasing demand for tertiary education in the Caribbean region is through distance education, specifically open and distance learning (ODL). Distance education offers developing countries the opportunity to address the problems of educational funding, access and quality (Perraton, 2007). In order to take advantage of ODL, three tertiary institutions in Barbados have decided to implement a shared services model in order to enable effective service provisioning while at the same time:

- a) Optimizing efficiency and effectiveness
- b) Making more effective use of scarce technical resources
- c) Obtaining the benefits of scale and minimizing costs
- d) Allowing academic staff and the institutions to focus on core activities and core competencies

This paper will describe the educational context for the implementation of this model, describe the challenges in the process of creating a shared services mechanism and will chronicle the lessons learned in the implementation of the shared ICT services for open and distance learning.

Literature Review

Bergeron (2003, p.3) in his book 'Essentials of Shared Services' suggests that this concept is about essentially optimizing people, capital, time and other resources. He defines shared services as "a collaborative strategy in which selected business functions are concentrated into semi-autonomous business units with management structures that promote efficiency, value generation, and cost savings for the parent company in a manner akin to companies competing in the open market."

In organizational governance there is a constant quest for increased efficiency and more cost effective approaches to operations. While this has generally been true for the private sector it is increasingly becoming an expectation within public sector organizations. Outsourcing, centralization, decentralization and other approaches have all been used as methodologies to achieving measures of efficiency and effectiveness (Reily, 2000). Within ICT in particular, the model of outsourcing has gained prominence due to the impact it has had on operational cost effectiveness. Quinn, Cooke and Kris (2000) in writing about the evolution of this process suggests that our knowledge and service based economies must be strategic about outsourcing and focus internal resources on "core competencies." He further suggests

that organizations "...leverage the capabilities and investments of others by exploiting three areas of intellectual outsourcing: (1) traditional service or functional activities performed in-house (e.g., accounting, IT, or employee benefits); (2) complementary, integrative, or duplicative activities scattered throughout the company; and (3) disciplines, subsystems, or systems in which outsiders have greater expertise or capabilities for innovation."

Outsourcing has been logically linked with the ideal of shared services among organizations, suggesting that where common operational and business objectives coexist a shared services model of outsourcing be adopted (Lee, 2006; Doh, Bunyaratavej & Hahn, 2009). It is reiterated that management can be more strategic at the corporate level and more cost-effective at the operational level within a shared services model. The implementation of shared services has not been without its limitations, especially as it relates to monopoly advantages and this was a concern in Australia, where the concept of shared services in the public sector is more widespread than any other country (Dollery & Bligh, 2010).

Supporting Shared Services

The Barbados Community College (BCC) is a government supported institution enacted by parliament with powers to award degrees from the associate to doctoral level. While the designation of Community College suggests a pre-baccalaureate focus, the institution has also offered some bachelors' degrees over the last ten years as allowed by its Act. BCC was opened in 1968, and with a current enrolment of approximate 3500, the physical plant has surpassed its expansion capacity. With access to tertiary education a priority for young secondary students, the Government has taken the view that it is much more cost effective to train a graduate within this environment than at the larger, more research oriented, University of the West Indies (UWI). With the annual rejection rate now reaching over 200% of applicants in some programmes, it has been proposed that the BCC look at increasing access through the use of an ODL mode of programme delivery. In addition to creating new programmes, the objective has been to provide the option of online access to the mandatory general education subjects.

The Erdiston Teachers' Training College is now sixty-two years old and impacts about 850 students annually. The college has been structured to enhance the quality of teacher education training through the delivery of pre-service and in-service continuing education for teachers and administrators. The institution generally delivers mostly franchised programmes from the UWI but in recent years has been encouraged to develop and expand its own programmes. It is felt that these programmes could be delivered in both face-to-face mode and a distance mode with priority going to the creation of a bachelor's degree in teacher education.

The Samuel Jackman Prescod Polytechnic (SJPP) was opened in 1970 with both day and evening classes focused on trade programmes. The institution now has over 2,000 students and provides courses in computer, electrical, building, automotive and mechanical engineering trades; commerce, agriculture and garment studies. A new campus opened in 1982 and has already exceeded its capacity. In 2003 the SJPP established the Open and Flexible Learning Centre with the aim of reaching non-traditional students who could not be accommodated at the campus. To date, that centre has been offering online courses with varying levels of success. While the centre appears to have solved the problem of offering very technical and practical subjects online, the problem of overall access remains as well as the appeal of the programmes to a wider cross section of the population.

The Higher Education Development Unit (HEDU), a division of the Ministry of Education and Human Resource Development has been charged with facilitating the central support and ICT services germane to the delivery of ODL programmes in the three institutions and specifically toward the realization of the immediate ODL goals of the three institutions. The shared services unit provides the physical infrastructure and the training necessary to fulfill the goals for each institution, including:

- a) High speed connectivity
- b) Associated infrastructure in the institutions;
- c) Shared e-mail support;
- d) Access to budgeting and financial reporting;

- e) Shared technical support;
- f) A common Student Management System and
- g) Provision of common access to a shared learning management system (Moodle).

The necessary band width has been secured through the establishment of a dedicated wide area network (WAN), the support staff is being hired and there has been a joint team working on developing common policy for the institutions. The consultancies to provide the necessary training and development for this programme are ongoing.

To date, much of this training and development work has been done in collaboration with the Caribbean Knowledge and Learning Network (CKLN). The CKLN is a regional entity established by the CARICOM Heads of Government in 2004 to encourage the use of information and communication technologies. CKLN also supports modern approaches to education with the goal of enhancing the global competitiveness of countries in the region. CKLN is mandated to assist regional tertiary institutions in developing a virtual learning network which will provide students, colleges and universities with cost-effective access to quality e-learning programmes. Given the mandate of CKLN and the immediate aims of the Government of Barbados the obvious synergies have afforded exceptional collaboration.

Once the decision had been made to pursue shared services, HEDU sought consultancy support for strategic planning, installation of the course management system and for training in course development. The latter two areas were handled through an external consultancy, while CKLN provided consultancy support for strategic planning. This consultancy produced a document to guide the implementation, called the Barbados Final Operational and ICT Strategic Plan Report. The report divided its recommendations were divided into 5 main areas:

- a) Governance
- b) Technology
- c) Training
- d) Human Factors
- e) Support

The report suggested that two committees be created—an oversight committee and an ICT committee. The ICT committee's mandate was to focus on technology and support, while the oversight committee concentrated on governance, training and human factors. The oversight committee was renamed the eLearning Committee and given the mandate to make recommendations to the institutions on policies and procedures for ODL. Both committees were composed of members from each of the institutions as well as HEDU. In addition, the eLearning committee was co-chaired by a representative from CKLN and an independent consultant. Regular meetings were held and a Term of Reference Document was developed.

Challenges

While there are clear advantages to using shared services to support the delivery of ODL programmes across the three institutions, there were several challenges encountered in the implementation. These challenges included the following:

- a) Leadership
- b) Communication
- c) Resource limitations

While the challenges are listed separately here, they are all intimately intertwined, such that the individual impacts are compounded.

Leadership

The implementation of any educational change requires effective leadership (Anderson, 2006, Campbell & Fullan, 2006; Phillips 2005) in part because leadership has a significant impact on student learning (Wahlstrom, Louis, Leithwood & Anderson, 2010). Leadership must drive the process forward, clearly stating the vision (Levy, 2003) and using their influence to encourage buy-in from the stakeholders. In this collaborative effort, the main challenge with respect to leadership was the absence of a clear vision embedded in the institutional strategic plan. Although there has been some progress made towards the development of such plans, in the absence of this vision it has been difficult to establish clear goals, objectives and timelines for accomplishing specific tasks with staff members assigned to the task. The lack of vision and strategic planning has negatively impacted every area of the implementation.

One of the possible reasons for the lack of a clear vision is that there are few people within the institutions who are knowledgeable and skilled in ODL. While distance education in a variety of forms has been used successfully in the Caribbean by UWI since 1978 (Marrett & Harvey, 2001), the use of the internet as a delivery mechanism is relatively new. Many higher education administrators have never taken an online course and are unfamiliar with both the theory and practical aspects of creating and managing an ODL programme. Without external assistance it is therefore difficult for these administrators to successfully create strategic plans for ODL. In addition, at the time of writing there was no national vision or policy on ODL, although the Ministry of Education has demonstrated its support for ODL and the shared services model.

As a result of this lack of knowledge, the implementation of ODL was viewed primarily as an IT issue; with little understanding that this implementation would require significant changes in organizational structure, organizational culture and pedagogy. There was scant realization that the scope of the changes would require a wide array of stakeholders to be involved in the process and a clear communication plan would need to be implemented in order to obtain buy-in.

Communication

Ineffective communication was one of the challenges experienced in implementing the shared services model. Communication of the vision for the project was ineffective, as many times individuals would arrive at events unprepared for the tasks at hand, or unclear as to how the event aligned with the institutional strategic plan.

The main method of communicating information was through email, as the management team considered email to be the quickest and most efficient communication method. However, although the use of email is widespread in this context and two of the three institutions have their own email addresses, individuals often did not respond in a timely fashion to messages. It may be that virtual communication is not an organizational norm at any of the three institutions.

Resource Limitations

The three resources that have had the largest negative impact on the implementation have been finances, human resources and time.

Using technology in education often involves a significant financial outlay. Most of the funds required by the institutions are provided by the government, which like many other governments worldwide has been negatively impacted by the global recession. This financial constraint, added to the absence of accurate cost estimates and budgets, has meant that there are few funds available to support ODL and no clear mechanism for fund provision or allocation.

Supporting ODL often requires a change in the organizational structure and the hiring and/or retraining of staff. As has been previously mentioned, it is difficult to acquire staff because of financial constraints and the limited availability of suitably qualified personnel. The lack of understanding of ODL has resulted in a gross underestimation of the amount of time and effort required to create online courses and to perform support tasks for ODL. Therefore, staff members are often expected to add ODL tasks to their normal workload, which is untenable. In addition there has not yet been a comprehensive plan developed to deal with the human resource issues.

The lack of a long term vision and strategic plan has also resulted in an inability to make decisions in a timely fashion so that required actions can be planned in advance to meet the scheduling needs of the organizations. As a result, individuals are often required to attend events at the last minute, which may result in schedule conflicts, and a reduction in the effectiveness of actions taken to support ODL implementation.

The resource limitations, communication and leadership issues were all challenges experienced in the implementation of shared services. Notwithstanding these challenges, significant progress has been made and several lessons learned.

Lessons Learned

The primary lesson learned at this stage in the process is that the institutions must have a clear vision and strategic plan for the implementation of ODL, a lesson that is supported by several research studies including Bates (2007), Hache (2000) Levy (2003), and Sife, Lwoga and Sanga (2007). Preparing and implementing a strategic plan is critical because it encompasses and impacts all the other areas; vision, finance, communications and resource availability. The strategic plan should include the inputs from all stakeholders (Levy, 2003) so that it would be easier to obtain buy-in from the stakeholders.

Communication is critical to the success of the implementation. A communication plan should be prepared and implemented early in the process to ensure that all stakeholders can contribute and are kept abreast of developments. This will increase buy-in and reduce human resource issues (Phillips, 2005).

The establishment of a joint governing body is important in order to create policy for the shared services (Dow, 2008). This body should include representation from each institution and could also include persons with expertise in ODL (Dow, 2008) if there is insufficient internal institutional knowledge on ODL. It is suggested that this body be external to the collaborating institutions in order to assist in conflict resolution.

Conclusion

Having focused in this paper on the challenges and lessons learned from the implementation of these structures it is crucial that some adjustments be made to the process moving forward. Before the next

phase is defined the following questions must be answered:

- a) How can HEDU assist the leadership at the three institutions in placing ODL within their developmental framework?
- b) How can the Government assist the three institutions in developing their strategic plans?
- c) How can a more effective communication strategy be developed to assist with the project execution?
- d) Is the scope and timeline of the project realistic in proportion to the staff allocation?

It is the role of the HEDU to ensure that these adjustments are made smoothly since HEDU can be perceived as the agent representing the parent organization. The research suggests that both efficiency and cost effectiveness can be realized if the process is tied strategically to the vision of each institution.

The use of technology as a tool for development is becoming increasingly utilitarian to small developing states. This paper highlighted the commitment of the CARICOM region and by extension Barbados to supporting three critical goals underpinning the development of ODL structures. These can be categorized as increasing efficiency through the establishment of shared services; increasing the access to and relevance of programmes to national development goals; and ensuring sustainability of new and developing ODL programmes through cost effective and well planned shared services. The establishment of the shared services unit at the HEDU will allow government to realize through economies of scale in the delivery of ODL training, infrastructure and support services to the three tertiary institutions.

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