THE ORIGIN, DEVELOPMENT AND IMPLICATIONS OF THE WESTERN GOVERNORS UNIVERSITY

by

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CHAPTER I

HIGHER EDUCATION THROUGH THE LOOKING GLASS

In the sequel to Alice in Wonderland (Carroll, 1987), when Alice stepped through the mirror in her drawing room and into the looking-glass world, she "noticed that what could be seen from the old room was quite common and uninteresting, but that all the rest was as different as possible." A little exploration found a world where "it takes all the running you can do to keep in the same place [and] if you want to get somewhere else, you must run at least twice as fast as that!" Statements that to Alice were utter nonsense, could be upon further consideration "as sensible as a dictionary." And the most practical action one could take was preparing for the most unlikely events.

In many ways, colleges and universities today are like Alice facing the drawing room mirror, suspecting what might be on the other side but not yet able to see much more than their own images reflected back. With a little exploration, however, things become "as different as possible." Faculty and students are interacting asynchronously, and only at a distance. It is possible to earn a college degree without ever setting foot on a campus, maybe without even taking a class. Corporations have their own universities, training employees for new jobs in a transformed economy. For-profit institutions are expanding across the country, using standardized curricula and a part-time faculty to address the needs of a narrowly targeted market. And venture-capital supported initiatives abound as Wall Street begins to take notice of a multi-billion dollar industry. Like Alice, institutions of higher education are finding themselves drawn into the

looking-glass world, almost without realizing it is happening. The invisible boundary separating the old, traditional institutions from newly emerging alternative forms of postsecondary education is beginning to fade, and colleges and universities are taking stock of the changing environment to see where they stand. On the other side of higher education's looking glass, nonsense ideas become sensible, and nothing is so hard as keeping up with change.

It is difficult to believe that higher education can ignore the changes which are a part of this looking-glass world. Enrollment is projected to expand dramatically as the children of the baby boomers begin reaching college age. The demographics of the student population are changing too, with increasing numbers of older students, part-time students, women, and minorities registering for college. Federal and state governments have limited funds available for higher education, while legislatures and governing boards are insisting on institutional performance for further budgetary increases. There is growing pressure for colleges and universities to respond to market forces, eliminate inefficiencies, and improve quality. Higher education, however, has proven remarkably resistant to change over the centuries. The Carnegie Foundation once noted that of the 80 or so organizations that have had unbroken histories since the Protestant Reformation, more than 70 are institutions of higher education. On the other hand, colleges and universities in the United States have been rather flexible in responding to the pressures of a changing society. Indeed, much of what we think of as traditional higher education -- faculty research, departmental organization, elective curriculum -- has been around for little more than a hundred years. Some aspects -- broad student access, federal financial support, the community college -- have only been important for a few generations. As the

title of Brubacher and Rudy's (1997) classic history of American colleges and universities points out, higher education is always in transition.

Despite this history, however, American higher education has received much attention recently for its perceived reluctance to adjust operations in response to the current challenges. A spate of books and articles highly critical of the enterprise has accused colleges and universities of a wide range of faults: Professors who spend too little time in the classroom and too much time on abstruse research; universities which neglect undergraduate education, and do not teach the kinds of skills that are important to industry; tenure policies that are a wasteful indulgence; faculty with lifetime employment and no accountability; and colleges that cannot control increasing costs (e.g., Aspen Institute, 1992; Brooks, 1994; Lewis, 1997; Marcus, 1997; Pew Higher Education Roundtable, 1996; Wingspread Group on Higher Education, 1993). These criticisms represent the new realities for higher education through the looking glass. Colleges and universities are being asked to adapt to a changed environment. As a whole, however, institutions have not responded very effectively -- often it seems they have not responded at all. They are still on the drawing room side of the looking glass, and their actions remain, to use Alice's description, "common and uninteresting." One commentator on higher education, for example, said that colleges and universities have done a "miserable job" in answering the questions posed by government and the public (Levine, 1997a). Put somewhat more delicately, another report suggested that "it is surprising that...institutions have not taken more serious steps" to address these issues (Commission on National Investment in Higher Education, 1997). Meanwhile observers continue to call for change, insisting that colleges and universities need to respond.

But what ideas for change are nonsense, and what becomes sensible upon consideration? It is hard to know without crossing that invisible boundary which separates the familiar from the fantastic. On the other side of the looking glass, education is not likely to be just a simple reflection of current practice, but rather it may become as different as possible from what now seems natural. Colleges and universities are facing a changing environment with potentially dramatic consequences for the future. It is a world where old assumptions no longer seem valid, and traditional institutions are being threatened by the new. But it is also a world full of possibilities and options. Everything is on the table, open for interpretation, negotiation, and reconceptualization. Ivy League institutions can develop for-profit subsidiaries. Columbia University already has. Virtual universities, with no campus and an on-line student body, can gain full regional accreditation. Jones International University already did. Rather than relying on institutions of higher education, publishing corporations and test prep companies can open their own colleges and market their educational services directly to the student. Harcourt General and Kaplan are each already doing just that. These are just early examples of institutions on the other side of the looking glass. They will not be the last.

Trends

There are several trends pushing more institutions toward the looking glass. They fall into four categories, one or more of which are mentioned by nearly every commentary on the state of higher education today. First, there is the rather intense criticism of colleges and universities, particularly by elected officials. The second item is the slowing of government financial support for higher education and the real reduction

in the amount of public money available per student for college. The third factor is the demographic change in the student population over the last two decades, and the enrollment increase projected in the immediate future. And fourth, there is the increasing capability of technology to change the dimensions of access and cost for postsecondary education.

Criticisms of Higher Education

In 1984, a short report by William Bennett, To Reclaim a Legacy, laid the foundation for much of the criticism of higher education to come. Bennett detailed the failings of colleges and universities, criticizing their curricular decisions, academic priorities, and graduation requirements. He blamed the faculty for narrow specialization and "lifeless, stilted, and pedestrian" teaching (p. 17). And he took colleges to task for being more concerned with protecting turf than with actively seeking reform of these problems. Bennett felt that the public had a right to expect something more from colleges and universities than what it had been getting, and he suggested that attention to the problems of higher education was overdue. "Higher education has largely escaped the public's eye," he wrote. "This situation should and will change" (1984, p. ii).

Bennett's prediction was soon realized. Allan Bloom's The Closing of the American Mind, published in 1987, was followed by a veritable onslaught of books critical of higher education--books with titles such as Illiberal Education, Tenured Radicals, The Hollow Men, Profscam, and Killing the Spirit. All were directed primarily at audiences external to higher education, and together they sold millions of copies. The reason for this external focus, as one author put it, was that those in charge of the university had "constructed machinery that has so far frustrated or sabotaged every effort

at meaningful reform that might interfere with their boondoggle" (Sykes, 1989, p. 3). The only way to force change, this author wrote, was to "storm the ivory tower" (p. 257) and publicly expose what was happening behind its ivy-covered walls.

What these books exposed cut to the core of higher education, challenging everything from curricular design and faculty perquisites, to graduation requirements and student life. Universities had abandoned standards in admissions. Political correctness had taken over the campus. The tenure system protected incompetence. Faculty were refusing to teach undergraduates, preferring to focus on graduate students and specialized research. The curriculum was no longer rigorous, grade inflation was rampant, and students were graduating without relevant skills. Through it all, the price for the privilege was increasing while quality of the experience declined.

The criticisms have continued, and they are still evident even in recent years. Rhodes (1998), for example, listed several "complaints against universities during the last five years or so" that taken as a whole, gave the impression that universities are "self-indulgent, arrogant, and resistant to change" (p. 4). These included the familiar charges of unreasonably high tuition, neglect of undergraduate teaching, garbled educational purposes, trivialized scholarship and the imposition of political correctness. The fact that these criticisms continue to have currency a decade and a half after the Bennett report suggests that higher education, at least in the eyes of its critics, has not adequately responded to the issues underlying the advertised problems.

Vest (1997) suggested that the main problem academics seem to have in addressing this criticism is the belief that their positions are "of such enduring importance as to be unquestionable" (p. 54). An editorial in the journal Science is a case

in point (Atkinson, 1997). The author argues that university researchers should receive more money, not less, and calls the central role that higher education has had in government-sponsored research since World War II "unerringly right" (p. 1479). This sort of position does little to assuage critics who may not be as sure. Add to this a mix of scandals over research money, colleges pricing themselves out of reach, a resistance to accountability, and questions about faculty workload -- it tends to lend even more credence to charges that the university is incapable of reforming itself. Correct or not, the impression that many have is that higher education will not, or cannot, respond to concerns being aired.

The government has taken note of the lack of response from higher education, and has been increasingly ready to pass legislation affecting colleges and universities. Virginia for example is considering linking funding to the performance of public institutions in such areas as faculty productivity and student achievement on exit exams (Hebel, 1999). The Governor of Massachusetts has proposed creating "charter colleges" free from tenure and unions to increase the competitive pressure on traditional institutions. "Rather than trying to change the entire system all at once, we might have a little more success showing how things can be improved at a few institutions that can benefit students and the Commonwealth of Massachusetts," said one advisor to the Governor (quoted in Healy, 1999). Colleges and universities, to the extent that they exhibit a reluctance to change, are finding themselves on the wrong side of this legislative agenda. Today's institutions of higher education are simply being asked to respond in a way that addresses the legitimate concerns of the public. The Executive Director of the Association of Governing Boards put it bluntly: "If faculty members,

administrators, trustees, legislators, and governors fail to find new ways of communicating with one another and reaching new levels of understanding soon, there will be cause for despair" (Ingram, 1999).

Government Funding

Despite predictions only a few years ago that tight economies and a drive to balance the budget (Hartle, 1996; Lively, 1995; Schmidt, 1996) would define higher education's "financial fall from grace" (Breneman, 1995), higher education is continuing to be largely supported by government funds. At the state level, funding increases have outpaced inflation for several years (Schmidt, 1998). In Washington, the anticipated draconian cuts from the new Republican Congress never materialized (Hartle, 1996), and current budget proposals indicate continued support for education. Even though money is still arriving from government, however, the terms of the support have changed dramatically from earlier decades.

Levine (Levine, 1997a; Levine, 1997b) calls this change the result of higher education's transformation from a growth industry to a mature industry in the eyes of government officials. As a growth industry, colleges and universities were expected to do only one thing: Grow. In the years after World War II, funding to accomplish this growth was easily available, with large annual increases both expected and received. In constant 1995-96 dollars[1], government support for higher education increased 92 percent in the 1950s and more than 160 percent in the 1960s. From 1970 to 1976, the increase was

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[1] The Consumer Price Index was used to calculate constant dollars in the 1950s. The Higher Education Price Index, which became available beginning with the 1960-61 academic year, was used after that (National Center for Education Statistics, 1998b, Table 38).

more moderate, but still a substantial 29 percent. But over the next twenty years, through 1996, the real gain in government support for higher education has only been about 23 percent. While the recent increases are an improvement, they are far from the incredible growth seen in the fifties and sixties (National Center for Education Statistics, 1998b, Table 328). Higher education has matured and few expect government funding ever to surge again.

Even with the recent small gains, however, funding per full-time equivalent student has declined since the mid-1980s. Since the government is the primary source of revenue for public institutions, the decline hit these colleges and universities particularly hard (El-Khawas & Knopp, 1996). Adjusting for inflation, between 1985 and 1995 there was a 15 percent reduction in per-student funding from government sources for public higher education. The result was that the share of all revenue for public institutions represented by these sources went from 53 percent to 42 percent over that ten year period (National Center for Education Statistics, 1998a, Indicator 54). The recent increases have not significantly reversed this trend. They only have given pause to a downward spiral.

Higher education is no longer assured that it will fare well in the competition for limited public money. Funding priorities have changed, with more money being spent on prisons, health care, K-12 education, and transportation (Hossler, Lund, Ramin, Westfall, & Irish, 1997), leaving a much smaller portion available for higher education. Kerr (1994) has described the result for higher education. The university, he said, “is being faced with enhanced guerrilla warfare over resources -- overall among competitors within the welfare state and, more specifically, within campuses, among campuses, between systems, and between public and private campuses for competitive advancement” (Kerr,

1994, p. 177).

Colleges and universities are being pressed to make changes in the face of these new financial realities, to diversify funding sources, re-focus their missions, and eliminate programs. The increased competition for funds available to higher education through government appropriations requires adjustment, especially considering that this situation is likely to be permanent (Breneman, 1995; Levine, 1997a; Schmidt, 1997). Colleges can no longer afford the status quo, and they must change to meet this new challenge.

Enrollment and Changing Demographics

When the increase in high school graduates from the baby boom ended in the early seventies, higher education braced for an enrollment crunch. After a spectacular rise during the sixties, the number of students enrolling in college was expected to drop precipitously (Kerr, 1997). But that did not happen. Since the peak of the baby boom graduated from high school in 1975, total enrollment in higher education has increased around 30 percent (National Center for Education Statistics, 1998b, Tables 3 and 184). While this meant that higher education was growing at a much slower rate than in the sixties and early seventies, it is a vastly different outcome than the 40 percent enrollment declines that were predicted (Kerr, 1997).

The students who made up the enrollment increase of the last twenty years were different than their predecessors, however. In the twenty years since 1975, the number of students older than 25 increased from 37 percent to 43 percent of the total college enrollment. The number of students working more than twenty hours per week increased from 26 percent to 53 percent of enrollment. And the number of part-time students grew

at twice the rate of full-time students. During these years, the image of the traditional undergraduate -- attending full-time at a four year college, 18 to 22 years of age, and living on-campus -- had become a myth. By 1995, fewer than one in six of all undergraduates fit this stereotype. The college student today is more likely to be older, working, and attending classes part-time than to be an 18-year-old straight out of high school (Levine & Cureton, 1998; National Center for Education Statistics, 1996, No. 67; National Center for Education Statistics, 1998a, Indicator 52; National Center for Education Statistics, 1998b, Table 174).

The student population is changing in other ways as well. The number of white male students declined by more than 5 percent between 1976 and 1996. During that same time, however, the number of students of color more than doubled, and the number of female students increased by 53 percent. In the span of twenty years, the student population has become increasingly diverse, and population trends suggest that these enrollment changes will continue, further diversifying the student body (National Center for Education Statistics, 1998b, Table 207). In addition, these changes were happening at a time when the number of high school graduates was in decline. Now, however, the "Baby Boom Echo" is beginning to hit higher education. For the past few years now, total public school enrollment in the primary and secondary grades has surpassed the previous high set in 1971. And while in 1971, only a little more than half of high school graduates went on to college, current rates are approaching 70 percent (National Center for Education Statistics, 1998b, Tables 3 and 184). With more students graduating from high school and more deciding to continue their education, the enrollment in higher education for the 18 to 24 age group is expected to increase by as much as 30 percent

(Macunovich, 1997). Kerr calls it “Tidal Wave II” (1994), a term which expresses the concern that student demand could swamp existing institutions in almost every state (Zumeta, 1996).

The changing demographics and enrollment patterns mean that more students, and a greater variety of students, will be coming to college. These students have new needs and are making new demands on institutions of higher education--the best service at the lowest price, with nothing extra on the bill (Levine & Cureton, 1998). Private, for-profit educational institutions stand ready to take advantage of this emerging market for a low-cost, service-oriented college education (Marchese, 1998). A new enrollment crisis is in the offing, if colleges and universities are unable to make their institutions attractive to this new population of students.

Technology

The increasing capabilities of technology have created new expectations for higher education. Everything from the importance of the campus as a physical location, to the professor’s role as an instructor of students seems open for reinterpretation. As a report a few years ago put it, “The pace of change is rapid, and most colleges and universities are finding it a daunting task to try to keep up with new opportunities” (El-Khawas & Knopp, 1996, p. 28). Technology affects two major issues in higher education: access and cost.

The interactive capabilities of advanced technology provide a means for improving access to higher education through distance learning. With the internet and the world wide web, the typical modem connection today can allow a student--despite being far-removed from a university campus--to participate in class discussions, communicate

with professors, collaborate with peers, and receive feedback on course work. A student in a small town in rural Montana, for example, could take a distance learning course from Arizona State University. The campus may be hundreds of miles away, but by logging into an internet site, the student can download course notes, comment on the readings, or ask the professor a question about an upcoming paper. All this can be done from home or from work without even commuting to a campus, much less residing at one. Through distance learning, technology can create a system where no student is denied access to higher education based only on physical proximity to a college campus.

Technology is also increasing access to education by delivering information and resources previously available only with difficulty, if available at all. Now nearly every government report is available through the internet within days of being published. The libraries of research institutions are fully searchable, and magazines and newspapers have full-text versions of their stories and articles archived for retrieval. Increasing numbers of academic journals are on-line, nearly any book one wishes to own can be ordered from a web site, and the most arcane topics have home pages devoted to their study. Badrul Khan (1997) in an introduction to his volume on web-based instruction wrote "While growing up in Bangladesh during the 1970s, I used to dream about having access to well-designed learning resources that were only available to students in industrialized countries. In the '70s, it was unthinkable that we might have equal access to those resources. In the '90s, it has become a reality" (p. 5). Technology has provided that reality.

At the same time that technology provides access to more students, it also has the potential to dramatically change the cost of higher education. "A curriculum, once

created," stated Eli Noam, "could be offered electronically not just to hundreds of students nearby, but to tens of thousands around the world" (1995). This has the potential to change the economic "rules of thumb" (Zemsky & Massey, 1995) by which colleges and universities have traditionally determined expenses and allocated resources. The typical formula stipulates that a certain number of faculty can teach a certain number of classes attended by a certain number of students. Because of assumptions about quality, a low student-faculty ratio sets the limits of the equation, making traditional higher education a labor-intensive endeavor (Daniel, 1996). In addition, when more students are brought into traditional higher education, the physical plant itself, from classrooms to parking lots, becomes necessarily more extensive--and more expensive.

Advocates of technology, however, hold out the possibility of a system where the faculty could teach more students with no need to build additional facilities and no decline in the quality of the educational experience (Denning, 1997; Katz, 1999; Nayman, 1997). The potential for more students to be served without increasing instructional costs or investing in additional classrooms and residence halls is an attractive option for cash-starved institutions. The extent to which this can be true remains to be seen, but with the financial pressures higher education is under, the urge to experiment along these lines will be irresistible.

Government and the public expect higher education to respond to this new technology and use it -- as the business community has -- to increase productivity and reduce costs (Davis & Bodkin, 1994; Mahoney, 1997). But in order to do that, colleges and universities must explore new models and methods for higher education, and adapt technology to the task of teaching students and providing them with a quality educational

experience.

Implications

The four trends described above focus attention on the changing environment in which higher education operates. Extensive public criticism, accompanied by financial constraints, burgeoning enrollments, and technological advances, have placed new pressures on higher education to adapt. But colleges and universities have moved slowly to respond, and have been hesitant to accept the need for change (Pelikan, 1992; Vest, 1997).

If Levine is right about "higher education's new status as a mature industry" (1997a), colleges and universities must adjust to these new realities, as they are likely to be permanent. According to the business literature, players in mature industries will not survive by operating under business-as-usual practices (Baden-Fuller & Stopford, 1994). As one consulting group put it, leaders need to attempt "significant restructuring" and should resist the urge to just "rearrange some furniture" (Merrifield Consulting Group, 1997). The trends affecting higher education demand this sort of "significant" response. Enrollment increases and demographic change will continue through the next decade (National Center for Education Statistics, 1998c), and the pace of technological change will only quicken. Even with recent increases in government funding for colleges and universities, there is little reason to suspect that higher education is about to begin a new golden age of never-ending expansion.

The questions being asked by government in response to the public criticisms of higher education similarly suggest a need for the more fundamental approach of

restructuring. Institutions are being told that they cannot continue on their current path and satisfy the needs of society. They are being asked to make major changes and fundamentally rethink how they operate. Colleges need to answer these questions and respond to the calls for change.

Charles Vest, president of the Massachusetts Institute of Technology, wrote in a commentary on these trends that "universities must change. They do not like change, but they must become less fearful, less resistant, and more responsive to it" (Vest, 1997, p. 54). Public perceptions, government funding and requirements, changing demographics, and developing technologies, are all coming together to drive this need for change. Colleges and universities need to meet the challenges posed by these trends and respond to the concerns of the government and the public.

Western Governors University

Four years ago, a few western governors identified similar trends facing their systems of higher education. They saw a future with more students than they could afford coming to college. They looked at the state budget and saw no money forthcoming to build new campuses to handle the crush. And they saw students being denied access to higher education because of the unwillingness of existing institutions to take advantage of technology and distance learning. Since these governors were also sharply critical of traditional higher education and doubted its ability to respond to these challenges, they decided to create their own university which would. They bypassed tradition and developed a new institution, the Western Governors University (WGU), that would serve as a catalyst for change in higher education. They created a university on the other side of

the looking glass that would be, as Alice might say, “as different as possible.”

There are some institutions which have had an enormous impact on American higher education. Harvard stands out as the first college. Cornell is the crown of the land grant movement. Johns Hopkins is America’s first research university. The University of Wisconsin represents the epitome of the service ideal. These are landmark institutions that defined the direction of American higher education. Today, like them, the WGU has the potential to set the future direction for higher education. Having gathered support from the governors of seventeen states and one territory, the WGU has been established to demonstrate new ways of offering postsecondary education. It is not just another new institution of higher education. Much like Johns Hopkins or Cornell, this is a new institution that has the potential to make a singular contribution.

It is an institution of higher education that, while still little more than a four-page vision statement, had colleges and universities concerned about their own survival. Before even a single student was enrolled, its impact was being compared to that of the GI Bill. No courses had been listed in its catalog, yet people were calling it the most ambitious distance learning initiative in the United States. Barely begun, the WGU has captivated politicians, business executives, academics, accreditors, and technology advocates. They have seen the future of higher education, and it is the WGU. Yet, to some, it is a scary future to consider. Students will be able to select faculty like a health club member selects a personal trainer. Performance, not grades, will be the coin of the realm. Competition between institutions will be based on price and service, while a host of private educational providers emerges to meet the demands of the market. For colleges and universities that have grown comfortable in their insularity, the threat represented by

the WGU can be both disorienting and galvanizing.

But what are the changes heralded by the WGU? Why did a group of governors, hardly experts in higher education reform, begin to ask such radical questions? And what are the implications of their actions for the future of higher education? The WGU is a new institution; its promise of change is still only potential. Understanding that potential, however, and the motivating forces behind it, are necessary prerequisites to making decisions about the uncertain future.

In the history of American higher education, individual institutions have made a difference. Within 25 years after the founding of Johns Hopkins University, colleges and universities were scarcely recognizable in comparison to their predecessors. In those years, the country was ready for the change. When it happened, it took the rest of American higher education along with it. The WGU may occasion a similar transformation of higher education. From this vantage point it is impossible to predict. But what is certain is that an institution which has barely opened its doors has posited a model that cuts through the standard notions of what higher education is. Any consideration of the future must take the WGU seriously.

The Study

There are many colleges and universities that one could examine to get a sense of what might be on the other side of higher education's looking glass. In 1997, when this study began, several institutions and organizations were developing that might have fit the bill. Jones International University, for example, was a completely on-line institution in the midst of an ultimately successful accreditation review from the North Central

Association. National Technological University had been in operation for several years offering distance education engineering and technical degrees using brokered content taught by faculty at other institutions. The State of California had just established the California Virtual University, an administrative shell for the collected distance education offerings from the public colleges in the state. The Southern Regional Education Board had created a clearinghouse electronic campus to perform a similar task for the institutions in more than a dozen states in its region. The University of Phoenix was expanding its network of campuses across the United States, concentrating on providing a practical education to the adult market. California State University at Monterey Bay was developing a competency-based approach to university education. Several corporations had organized in-house educational institutions for employee training purposes. And any number of so-called traditional postsecondary institutions were developing and expanding their distance learning and extension services in light of the new availability of technology and the expanding student market.

None of these options, however, provided the same possibilities for study as did the WGU. It was a brand new institution that had already established a national -- even international -- reputation for innovation and reform. It was an independent university, offering its own degrees rather than simply coordinating the efforts of other institutions. Because of this, the WGU was eligible for accreditation, demonstrating its intention to be considered part of the education community. At the same time, the institution was designed to challenge the established order and demonstrate an alternative to traditional postsecondary organizations. Chief among these challenges was to be its focus on competency-based education -- the model of granting degrees based on assessments of

student proficiency rather than the accumulation of course credits. Another challenge was the WGU's use of faculty from other institutions as its instructional staff, with the academic content for its degrees provided by colleges and universities across the West. Finally, as an institution with the support of a third of governors in the U.S., it was a dominant example of the vehemence with which the political establishment was looking for change. While there were many institutions with one or two of these characteristics, the WGU was the only one which combined them into a single organization.

Three main questions guided the investigation, resulting in the text that follows over the next five chapters:

1. How and why did the WGU begin? The institution seemingly came out of nowhere, an example of educational reform that moved relatively quickly from slogan to substance. The enormity of the governors' vision, as a matter of fact, was one of the more intriguing aspects of the WGU. This was an institution, if one were to believe the rhetoric surrounding its founding, that contained the solutions to all the ills of American higher education. It was specifically conceived to transform the educational process and challenge the status quo. Politicians are good at making speeches decrying the problems within colleges and universities -- indeed this is one of the more salient features of the current higher education environment. Less common, however, is an agenda-setting university created as a response through the sheer political will of its sponsors. Research into the origins of the WGU was intended to show the governors' impetus for creating such a radical institution.

2. How did it become accepted as an accreditable institution of higher education? This question had two threads to it. The first aspect involved understanding the WGU as an

institution of higher education. It was such a different kind of university that it was initially difficult to even place it in the same category as, say, Columbia University, the University of Wyoming, and Weber State University. Describing the WGU as an institution of higher education -- rather than some other, non-collegiate, credentialling body -- became, then, a focus of the study. The second aspect of this question involved how the WGU approached accreditation, as well as how the accreditation community responded to this rather different university at their doorstep. Accreditation is a singularly defining characteristic of a institution of higher education in the United States. Yet here was an entity, calling itself a University, which did not fit under any agency's guidelines for what an accredited institution should look like. The goal here was to discover what made the WGU, different as it was, acceptable as an accreditable university.

3. <u>What are the implications of the WGU for higher education?</u> The WGU represents a new way of thinking about higher education in this country that could be quite significant. While an evaluation of the success of the WGU as an agent of change is beyond the scope of this investigation, it is still important to ask what it all means for existing colleges and universities. The WGU began as both a call for change, and as a response to a changing environment for postsecondary education. It has become a symbol of the continuing efforts, offered by a spectrum of actors, to better address the educational needs of students and society. The WGU as an institution of higher education may not succeed, but it has opened a Pandora's box of questions with which other institutions are beginning to grapple. Outlining some of these implications is the final result of this investigation.

Methodology

To answer these questions, the WGU was approached as a case study, although even upon completion it is not exactly clear what is the larger phenomenon for which the institution could be considered a 'case.' It perhaps is an example of a new kind of postsecondary institution -- such as Jones International University, the University of Phoenix, or the California Virtual University -- but this is not quite accurate. The WGU does symbolize these new efforts and the changes they represent, as is discussed in Chapter 6. It is rather different in its particulars, however, and in fact the WGU was ultimately presented to the accreditors as an institution that should be considered as comparable to existing colleges and universities. Nor is it precisely a case of a distance education institution. The fact that the WGU offers competency-based degrees was more significant in its development. It is an example of an institution that is facing the new realities of the higher education environment, but as it was established by political fiat, the WGU provides few lessons for how existing universities might be able to effect change in their own organization and operation.

Still, the WGU was considered as a case study for several reasons. In general, according to Robert K. Yin (1994), case studies are "the preferred strategy when 'how' or 'why' questions are being posed, when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-life context" (p. 1). These attributes describe well this study of the WGU. In addition, case studies can be useful when the investigator wants "to understand processes of events, projects, and programs and to discover characteristics that will shed light on an issue or object" (Sanders, cited in Merriam, 1997, p. 33). Finally case studies can be particularly helpful

when the object in question is "selected for its very uniqueness, for what it can reveal about a phenomenon, knowledge we would not otherwise have access to" (Merriam, 1997, p. 33). In this research, the phenomenon revealed is the WGU itself and the role that it has played in the higher education scene over the last four years. In that sense, it is a most unique item -- a case, in fact, of one.

Not only does viewing the WGU as a case study seem appropriate based on what kind of information is being sought (Merriam, 1997), it offers several methodological advantages as well. As a broadly qualitative research method, the case study provides the flexibility necessary for in-depth exploratory investigations (Levine, 1980). The researcher has the freedom to approach questions from multiple angles and through multiple sources, and to pursue new questions as they emerge through the ongoing research. This includes the freedom to pursue investigative dead-ends, at least until their promise or the researcher's stamina fades. In addition, case studies provide a method for handling topics which have many more variables than data points, when the boundaries between the topic and its context are fuzzy, and when including the context is critical to understanding the topic in its full complexity (Yin, 1994). For these reasons the case study was the preferred approach for this study. The fact that the institution was not particularly representative of any phenomenon larger than itself (unless one considers higher education as a whole to be the broader frame) did not pose any problems during data collection and analysis.

The Data

The study made use of three research techniques: observation, interviews and

document analysis. Two meetings of the WGU Board of Trustees, one meeting of the Western Governors Association, and a WGU-sponsored conference on technology standards for distance learning were observed during the course of the study. While these were important events to attend, they primarily served as avenues of access to decision-makers, and often resulted in serendipitous encounters with others interested or involved in what the WGU was doing. Informal discussions in these contexts were too numerous to mention, but were significantly responsible for the development and refinement of preliminary conclusions regarding the WGU's role and function in higher education as a whole. In addition, recordings of two additional meetings were obtained -- one from Las Vegas in 1995 when the WGU idea was first publicly discussed, and the other from Omaha in 1996 when the governors accepted the implementation plan. The relevant portions of these tapes (Las Vegas was audio taped; Omaha was video taped) were transcribed and are referenced in the text as (Western Governors Association, 1995b; Western Governors Association, 1996g), respectively. Finally, one information session held during the WGU-sponsored technology conference was observed and audio taped. This is referenced as (Western Governors University, 1998j).

Formal interviews were conducted with 58 people during this study, and nine were interviewed more than once. They were all promised anonymity for their participation -- the consent form used is duplicated in Appendix A -- and between 20 minutes and two hours were spent in each interview. People were targeted for interviews based on their involvement with the WGU either as staff, consultants, or political representatives. In addition, several representatives from traditional universities which served as WGU pilot institutions were interviewed, as were a number of senior staff from

higher education associations in Washington, DC. (See Table 1 in Appendix B for a categorization of the interviewees). The format was open-ended and conversational, following a common inventory of issues and topics depending on the status of the interviewee. The style of these discussions may best be characterized as "keeping on target while hanging loose," to use Rubin and Rubin's (1995) description of qualitative interviewing technique. While an interviewing guide was used (see Table 2 in Appendix B), it did not specify the specific order and wording of the questions. Rather, a "flexible, iterative, and continuous design" was used (Rubin & Rubin, 1995): flexible in the sense of adjusting the questions being asked to take advantage of the particular expertise of the interviewee; iterative in the sense of focusing the questioning of later interviews based on the information gathered from earlier ones; and continuous in the sense of an ongoing redesign of the protocol as additional questions became salient or old questions lost their relevance (Rubin & Rubin, 1995, pp. 43-49).

Interviews took place between August 1997 and June 1998, with several additional interviews conducted in January of 1999. The importance of this interview data cannot be overestimated. The WGU planning process was conducted rather informally, with much of the communication and decisions occurring through email, conference calls, and impromptu conversations for which only the barest record exists. The only way to accurately reconstruct this process was by interviewing as many of the participants as possible. Since only a few years have passed since the initial idea was formulated, all of the key players were fortunately still available and willing to assist in this reconstruction. Interview data is referenced in the text by the general descriptor, "Interviews."

The final source of data was contained in the documents collected during the course of the study. Filling a file cabinet, they were by far the most voluminous source considered in this investigation. There were three kinds of documents: external, internal, and public. External documents consisted of articles and essays about the WGU from the popular press, higher education associations, and policy institutes, as well as books and journals from the higher education literature which referenced the WGU. These were used as examples of the variety of opinions regarding the WGU. Internal documents consisted of memos, reports, minutes, and draft documents produced by the WGU staff and consultants which were not meant for public distribution. These were documents which informed and described the decisions made during the development of the institution, and were often useful in verifying historical information given in the interviews. The final category, public documents, included all of the information made accessible to a general audience, including information on the WGU web site, press releases, speeches, brochures, and other public relations materials. These were important indicators of how the concept of the WGU evolved as the job of institution building progressed. Documents explicitly used in this study are cited in the text and listed in the reference section. In addition, Appendix C contains a list of more than 300 documents which informed and extended the data collected through the interviews, but were not necessarily referenced in the text.

Analysis

The data collected was almost overwhelming. The transcripts of interviews, meetings, and speeches resulted in nearly 1000 pages of text. Several times that amount

of paper accumulated through photocopies and printouts of relevant documents, articles, and reports. More than a year of interviewing and observations produced a half dozen legal pads filled with field notes. This mass of data needed to be broken down into smaller and more manageable pieces. This was accomplished in two ways. The documents and field notes were categorized by topic or event (e.g., Accreditation, Implementation Plan, 1995 Las Vegas Meeting, etc.) and separated into approximately 80 file folders. Descriptions of each document were then entered into a computer database which made them easily searchable by keyword, date, author, topic or event. For the interview transcripts, a separate database was used. Nearly 1500 sections, ranging from a single sentence to full paragraphs, were identified within the transcripts based on similar topics and events as the documents. Once the sections were entered into the database, the program facilitated the same searches as were possible with the documents, with the addition of the ability to search the actual full-text of every transcript as well the assigned keywords.

In explaining the analysis of the data he collected for the classic study, Street Corner Society, Whyte (1955) stated up front his philosophy:

> The ideas that we have in research are only in part a logical product growing out of a careful weighing of evidence. We do not generally think problems through in a straight line. Often we have the experience of being immersed in a mass of confusing data. We study the data carefully, bringing all our powers of logical analysis to bear upon them. We come up with an idea or two. But still the data do not fall in any coherent pattern. Then we go on living with the data ... until perhaps some chance occurrence casts a totally different light upon the data, and we begin to see a pattern that we have not seen before. This pattern is not purely an artistic creation. Once we think we see it, we must reexamine our notes and perhaps set out to gather new data in order to determine whether the pattern adequately represents the life we are observing or is simply a product of our imagination. Logic, then, plays an important part. But I am convinced that the actual evolution of research ideas does not take place in accord with the formal statements we read on research methods. The ideas grow up in part out of our immersion in the data and out of the whole process of

> living. Since so much of this process of analysis proceeds on the unconscious level, I am sure that we can never present a full account of it. (Whyte, 1955, pp. 279-80)

This statement well describes the analysis for this study. There was a story to be told, and the major task was uncovering the best way to tell it. Very little about the WGU was clear at first blush, and it was only after the better part of a year of writing and re-writing, telling and re-telling, that the various pieces of a final draft emerged. Connections among the data became more clear, and the contradictions inherent in multiple descriptions of the same events led to a deeper understanding of the development and importance of the institution. The questions of the study -- how and why the WGU developed, how it became an accreditable institution, and its implications for higher education -- have been answered, but only partially. As a still developing entity, the WGU has much more to teach. This document represents, then, a first attempt at learning what adventures await on the other side of the looking glass.

The chapters which follow are organized roughly around the questions of the study. Chapter 2 is an account of the origins of the WGU and how it developed from one governor's idea to a shared vision of a multistate, competency-based educational institution. Chapter 3 explores this vision in more depth, identifying the significant changes that occurred during its evolution into a real institution of higher education. Chapter 4 describes the process of accreditation and the accommodations made by both the WGU and the regional accrediting agencies to facilitate the process. Chapter 5 describes the WGU's unique academic model and organizational structure as it was ultimately brought to the marketplace. And Chapter 6 concludes with a discussion of how the WGU has affected higher education as a symbol of change, even though the institution is still in its infancy.

What follows, then, is a peek on the other side of Alice's mirror. The trends facing higher education suggest that colleges and universities will need to change to meet the demands of a new environment. The adjustments necessary could be substantial, and many institutions have only just begun to think about what is possible. The WGU, however, is one institution that is as different as possible. This is the story of how it got that way and what the implications are for a system of higher education just starting its own journey through the looking glass.

CHAPTER II

ORIGINS OF THE WGU

The history of the WGU began with Governor Michael Leavitt of Utah and a chance meeting with a university president in Arizona. Ironically, Leavitt was there to talk about college athletics (Interviews). By the time he left, however, he had begun to think about higher education in a new way. Leavitt would soon be heading in a direction that was far from the competitive world of intercollegiate sports. University collaboration, not competition, now had his attention.

The meeting occurred early in 1995. Governor Leavitt agreed to go on a tour with staff from his alma mater, Southern Utah University, of the universities that made up the NCAA's Big Sky Conference. Southern Utah was applying to join the Conference and the governor was there to show his support and commitment to NCAA sports at state institutions. A stop on the circuit included Northern Arizona University, and a visit with its president, Clara Lovett. During the conversation, the Governor asked about some of the things that Northern Arizona was doing, and President Lovett mentioned the distance learning initiatives in which she was heavily involved (Interviews). Governor Leavitt talked about Utah's investment in distance learning as well, and soon sports were forgotten as the conversation turned to this common interest.

Governor Leavitt was intrigued by what he was hearing. Here was an established distance learning program just across the state border, yet Utah students had no access to it. Similarly, Arizona students could not take the courses offered through the Utah

network. What was stopping the two networks from linking up? President Lovett had a quick answer. There are several reasons it cannot happen, she said, "none of which have anything to do with technology" (Interviews). Lovett named three barriers -- bureaucracy, tradition and regulation – that would prevent the kind of interconnection of state distance learning networks that Governor Leavitt suggested. He spent the next few months mulling over that response.

Education, Technology and Interstate Collaboration

Leavitt, a Republican, had been deeply involved in education issues even before he was Governor. He had served on the Utah State Board of Regents, and was Chairman of the Education Subcommittee on the Utah Commission for Efficiency and Economy in Government. In addition, as a member of the Legislature's Strategic Planning Committee, he helped develop a long-term plan for Utah's public schools. This carried into his campaign for Governor, where he made "world-class education" a core plank in his platform (Leavitt, 1993c).

Leavitt was sharply critical of the status quo in education, and in higher education in particular. In a speech made shortly after his election in 1992, Leavitt foreshadowed the themes he would turn to repeatedly over the next few years. "We can't wait for a traditional bureaucratic structure to come up with a compromise that protects its interests," he said then. "We need real change. We need real solutions" (Jordan, 1992). The problem, as Leavitt saw it, was that more and more students were going to be coming to higher education institutions in his state. The state could not afford to fund new buildings and create new campuses to handle the influx. Some new model for higher

education was needed in order for the new students to be accommodated within the limited budget available. Within a year of his election, Leavitt proposed technology and distance learning as the way out of this bind.

In July 1993, Leavitt issued three challenges to educators in his state: First, "to make education an activity that is not bound by buildings, place or space;" second, to make "technology-delivered education a part of every student's educational experience;" and third, "to pick up the pace of education," and allow students to take college-level courses via distance learning while still in high school (Leavitt, 1993b). He encouraged the development and expansion of existing state distance learning initiatives and suggested that the state should be able to deliver the equivalent of a community college degree via advanced technology. Rather than spending money on the "bricks and mortar" construction of new schools and campuses, Leavitt argued that the state should be focusing its attention on "building the infrastructure of the future" (Leavitt, 1993b; Semerad, 1993).

Leavitt's emphasis on a technological solution to problems did not stop with education. State government, too, came under scrutiny, and Leavitt soon had several proposals on that front. In November 1993, he followed up his education speech with one directed at government workers (Leavitt, 1993a). He issued another set of challenges to this sector. Begin "thinking technology" and focus less on the physical infrastructure. Provide electronic access to state information for Utah citizens. Use technology to increase productivity, avoid redundant services, and stretch state tax dollars. Telecommuting, teleconferencing, and paperless offices were all part of his vision. The barriers to this were not technological, Leavitt said in the speech. The barriers were in the

"unwillingness to change and try something new" (Leavitt, 1993a).

Not quite a year later, in 1994, Leavitt inaugurated a business-government partnership called SmartUtah, a "big idea" that would "jump-start Utah into the Information Age, providing Utah citizens and business a sustainable competitive advantage in the rigorous global marketplace" (Leavitt, 1994a). SmartUtah was created to be an open network to which everyone would have electronic access to a myriad of public and private services. Rather than having multiple networks, each with its own set of specifications and parameters, SmartUtah would provide a common architecture through which any database or information resource could be accessed. The state would participate as an "anchor tenant" on this new network (Leavitt, 1994a), providing the basis and stability for private companies and other information providers to participate and invest in further network services. Leavitt pushed this concept on economic grounds. Tax dollars could be saved, jobs created and a geometric increase in value of technology investments would be realized.

While Leavitt was implementing his education and state government technology initiatives in Utah, he was at the same time becoming very involved in regional and national governors' organizations. He was elected vice chairman of the Western Governors Association in 1993, just months after becoming governor himself. The following year he assumed the chair of both the WGA and the Republican Governors Association, and was on the Executive Committee of the National Governors Association (Western Governors Association, 1995a). His agenda was focused on asserting the political power of state and local government as opposed to federal controls (Leavitt, 1994b). Leavitt saw regional collaboration being a more effective way of addressing

topics that affected the west in particular. More generally, he felt "that states are reinventing the wheel, state by state, on a whole lot of major, very expensive issues" and that by combining resources and coordinating purchases, a lot of wasteful duplication could be prevented (Interviews). Leavitt emphasized this theme during his leadership of the WGA, focusing on how technology infrastructure and delivery systems could improve access to health benefits and medical services (Western Governors Association, 1995a).

By early 1995, when Governor Leavitt met with Clara Lovett in Arizona, he had been active in the areas of technology, education, and interstate collaborations for most of his two years in office. He was so well known for his technology initiatives and his futuristic visions of what was possible that he was lampooned in a Utah student newspaper with the name "Governor Leavitt-ate" (Interviews). His education proposals had been funded by the legislature, and 10,000 students were taking courses over Utah's education network (Brown, 1995). He had begun the process, through SmartUtah, of moving more activities of the state government to an on-line environment. And through the WGA, Leavitt had been working with his fellow governors on regional issues, primarily in the health and welfare areas (Fahys, 1995; Western Governors Association, 1995a).

After talking with President Lovett, however, Governor Leavitt began to develop a grander vision. Arizona and Utah were both faced with similar problems – an increasing population coupled with limited funds to handle the growth. In fact most of the west, he knew, was having this problem. Leavitt realized that the ability of states to collaborate on these and many other issues was being compromised by entrenched

bureaucracies, outmoded traditions, and ossified regulations. These barriers that President Lovett named were not the narrow province of higher education alone. Rather they applied to all sorts of potential collaborations. Distance learning, Leavitt began to think, provided the opportunity to break down these barriers, opening the door for further interstate collaborative endeavors (Interviews).

Connecting his initiatives with technology in the Utah state government to this idea, he began to envision a multi-state version of SmartUtah: SmartStates. It would be a way of sharing information and resources among states using technology. It would allow economies of scale and help prevent each state from having to reinvent the wheel for each new, expensive, information technology project. Like SmartUtah, it would be a partnership between government and industry to develop standards and applications that would be usable across the network. Some of these things were happening with the health and welfare projects that Leavitt had already initiated through the WGA (Western Governors Association, 1995a), but the focus of those projects had always been rather narrow. SmartStates was a way of tying together disparate pieces, providing a broad framework for integrating and coordinating work being done to make a host of regional government services more efficient and less duplicative (Western Governors Association, 1998a).

Education was, in many ways, the perfect first project for such an initiative. It truly was a regional issue. Almost all western states were experiencing tremendous growth in population and a corresponding increase in postsecondary enrollments. This had already put a strain on their budgets and higher education systems, and if the enrollment forecasts were correct, the problem was only going to get worse (Interviews).

Dubbed “Tidal Wave II” and the “Baby Boom Echo” by several commentators around this time (e.g., Kerr, 1994), it was a phenomenon which presented a disturbing financial future for higher education. The notion of a sudden influx of students may have occasioned dreams in academia of a corresponding increase in funding. But Leavitt as governor was representative of the fiscally conservative western political tradition. Few of these governors had any inclination to pour money into the higher education systems in their states. And even with the inclination, few foresaw having the resources to do it (Interviews).

Leavitt had already identified Utah’s way out of the bind: distance delivery of education. With vast geography and dispersed populations, many western states found that investments in distance learning were the only way to provide educational opportunities to a rural population (Interviews). Now these distance learning networks were beginning to be seen as a method of improving access to greater numbers of students as well. Leavitt’s conversation in Arizona made him realize the untapped potential of all of these state-level networks. If they could be simply linked together, the capacity of the entire system would be enormous, solving the access problem. The expense of creating high-quality distance learning courses and degrees would be spread out among all the participants, reducing duplication and solving the financial problem. Finally, the sharing of distance education courses would serve as a model for other kinds of cross-border collaborations, facilitated by a newly established, multi-state communications network (Interviews).

Linking states’ educational networks, however, would involve breaking through the barriers that Clara Lovett identified. In the months after his meeting with her,

Governor Leavitt decided to use the Western Governors Association as his forum. A non-partisan organization of chief executives from 18 states, two territories and one commonwealth, the WGA was formed to "develop strategies for both the complex, long-term issues facing the West and for the region's immediate needs" (Western Governors Association, 1998b). While the organization had never really dealt with higher education issues before, this certainly fit within its mandate (Interviews). The governors, through the WGA, were uniquely positioned to provide the necessary political leadership on a regional basis to get the job done, break through the barriers, and provide a conducive state environment for further collaborative efforts (Interviews).

The Park City Meeting

It was convenient that Leavitt was finishing his term as the chairman of the WGA. By tradition, the chairman of the Association hosts the annual meeting. The summer 1995 meeting was to be held in Park City, Utah -- a beautiful mountain resort in the Wasatch Range, a short drive from Salt Lake. The agenda for the meeting was fairly full already, but as the chair, Leavitt could be flexible. His plan was to informally bring up the idea of interstate collaboration through information technology -- SmartStates -- and to use education as his example of what it could accomplish (Interviews).

In addition, the Park City meeting took place within a political context that was, in retrospect, similarly fortuitous for Leavitt's agenda. The 1994 midterm elections brought Republicans control of Congress. The Contract with America was the guiding document for the House majority, with its assumptions of a smaller Federal bureaucracy, devolution of power to the states, and fiscal conservatism. Leavitt had made changing the

state-federal relationship the primary theme for his tenure as Chairman of the WGA, and the 1994 national elections validated his position. In his cover letter to the WGA Annual Report, Leavitt commented on the shift and the opportunity represented by the new Congress:

> What a difference a year makes. ... States [now] bear the burden of proof to demonstrate that we have the capacity and the willingness to assume a larger role in governing. In Park City, it will be obvious that Western Governors welcome the challenge. (Western Governors Association, 1995a)

While the governors in the WGA generally supported the move toward reducing the size and influence of the federal government, they had one major issue with it: money (Interviews). The fear was that as Washington began the task of balancing its budget, the financial responsibilities for government services would fall to the states. This was not an abstract concern on their part. Proposals being floated out of Washington suggested that was exactly the outcome that would in fact occur. This became clear as the Park City meeting was being planned, and Leavitt devoted much of the agenda to discussions and presentations on this issue and how the western states ought to respond (Harrie, 1995; Interviews).

Specifically, the governors were working on a statement regarding welfare reform and how the proposed system of block grants would affect their states (Interviews). The grants were supposed to be indexed to state populations based on the 1990 census. But because the western states were among the fastest growing in the nation, this would have resulted in an unfair distribution of money. The western states would be in effect punished for growing faster than the national average. Even the Republican governors were concerned. The solution the governors were debating at the meeting centered on an alliance with several southern states that had similar concerns. Working together, the

states would both oppose the current funding formula, and present their own plan for welfare reform. Leavitt scheduled a private session at the Park City meeting to include a presentation led by Fife Symington, then Governor of Arizona, on the benefits of the southern-western alliance (Interviews).

These national and regional issues focusing on tight budgets, population growth, and state collaborations provided a compelling backdrop for Leavitt's SmartStates proposal. At the private meeting, Leavitt planned to segue directly from Symington's presentation to a discussion of his own, broader, collaborative initiative. As the outgoing chairman, he would offer his SmartStates idea as a topic for discussion, with higher education being the "first and best" example of a collaborative project (Interviews; Western Governors Association, 1995b). If the rest of the governors agreed to proceed, it would become a project for the new chairman, Governor Ben Nelson of Nebraska, to develop during his tenure.

The Governors' Discussion

Six months after his conversation with Clara Lovett in Arizona, Governor Leavitt opened the annual meeting of the WGA in Park City. In those intervening months, very little of his staff time had gone into investigating the policy implications of either the SmartStates initiative in general, or the interstate sharing of courses in particular. A quick survey of existing distance learning networks was done by Leavitt's staff, and he had mentioned the SmartStates concept once or twice to the Executive Director of the WGA (Interviews). There were no policy briefs or position papers composed for the meeting, and only the members of Leavitt's staff were aware of his education agenda for

SmartStates. It was still a rather undeveloped idea that Leavitt was going to introduce, and it was treated casually by both him and his staff (Interviews).

The Park City meeting was scheduled for Saturday through Monday, June 24 - 26, 1995. The main day for the activities was Sunday, June 25. The focus of this day was a conversation between the governors and Republican Pete Domenici, the new United States Senate budget chairman from New Mexico. The governors wanted some assurances that the changes being debated in Congress for financing social welfare programs would not adversely affect their states' budgets (Harrie, 1995). The governors were demanding flexibility in the block-grant program, and a reduction in the mandates from the Federal Government regarding how the programs were to be run. There was a recognition that adjustments would be necessary, however, and that the status quo had to change. "It can be done," Democratic Governor Roy Romer of Colorado was quoted as saying, "but it's going to be painful. And a lot of people are going to have to change their habits" (Fraughton, 1995).

Sunday evening, after the meeting with Senator Domenici, the governors went into a private session. No reporters were present, nor were any of the governors' staff, and no minutes were taken to record the ensuing conversation (Interviews). This was standard practice for the governors. Private sessions were regularly used at their meetings to have informal discussions on topics about which they were not ready to make public statements. As a non-partisan organization, this made it easier for the members of the WGA to work through complicated issues out of the political spotlight.

Governor Symington made his presentation on the western-southern alliance for welfare reform at this time. Said one participant:

> It was really a gripping presentation. Symington was on as he can be sometimes, and he really put together a brilliant presentation on how the states could interact, and how we could work together and get this Medicaid thing resolved. And how we can even get together on the implementation of programs and say look at what we use and how can we learn from each other and that kind of stuff. (Interviews)

The governors were "really energized" by Symington's discussion (Interviews), and enthusiastically endorsed moving forward with the proposal. They reserved time at their next meeting in December for a public announcement of the strategy. Considering the topic that Governor Leavitt was going to bring up next -- the SmartStates collaboration -- Symington's "gripping" presentation of the potential of this other collaborative venture was, as one WGA staff member put it upon reflection, quite "serendipitous" (Interviews).

Rather than going straight into the SmartStates discussion, however, Leavitt began by first talking about higher education. Cued by the just-completed presentation from the Governor of Arizona, Leavitt told the story of his visit to Arizona some months before. In a "meager problem statement" (Interviews) he presented the themes of population growth and budgetary constraint, by now a familiar outline to the participants of the meeting. Leavitt put these themes, however, in their educational context. He described how he found that both Utah and Arizona were facing similar problems and had developed similar solutions in their distance learning networks. He placed Clara Lovett's barriers of bureaucracy, tradition and regulation on the table. As governors, he argued, they could change state policies to break through these barriers, making interstate collaboration in this area a reality (Interviews).

The governors had been primed for this idea by a day of meetings about how the bureaucracy, tradition and regulation of the federal government were undergoing dramatic change. They had just finished cornering the Senate budget chairman, and

emphasizing their need for the flexibility to respond adequately to this new environment. They were palpably aware of the demands that population growth was placing on their budgets. They had just heard an exciting proposal for a collaborative attack on outdated welfare rules. As a consequence, the governors were ready to jump at the opportunity with which Leavitt presented them.

Leavitt had largely anticipated a positive response from his fellow governors to his proposal. He did not predict, however, the course the conversation would take from this point on. By offering his own mild critique of higher education, Leavitt "unleashed a torrent of pent-up frustration" (Interviews). The governors proceeded to "castigate" colleges and universities for being unresponsive to the needs of the states and the business community, and resistant to change in general. "I have never seen the governors light up faster," said one observer (Interviews). In the governors' minds, duplicate programs of dubious quality existed without oversight or accountability. Democrats and Republicans alike were frustrated with their state systems of higher education, and their inability to change them. Leavitt's open-ended suggestion of collaboration among states was immediately transformed into a much more far-reaching critique of higher education in general.

The governors began to exchange "war stories" about how resistant to change their colleges and universities were (Interviews). A veterinary school in one state could not be closed, even though it was academically weak and had low enrollment, because of the "tradition" involved. Others talked about the "furious ridicule" that they received if ever they tried to critique the university. One commented how the university in his state "came after him like he was nuts" after he suggested closing a program to save money

(Interviews). Accreditation was identified as a self-serving activity. We don't appoint the accreditors, one Governor noted, but "they certainly have a lot to say about what we get done, don't they?" Higher education was, another commented, little more than a "cabal" (Interviews).

Leavitt knew that he had hit a nerve. "I can just tell," he said. "I can just feel this is a major issue for us" (Interviews). Every governor in attendance recognized the importance of higher education to their economies and the future of their states. But they literally saw the system as being broken, and that they were "going to end up backwards" if it was not fixed (Interviews). Leavitt pushed the idea of a broad, interstate collaboration to the governors. No one governor could address this issue by himself, he argued, but by working in concert they could make higher education more efficient. They could provide access to more students without breaking their budgets. Colleges and universities would have to respond to the more competitive environment occasioned by all the new programs suddenly available from other networks. Parochial barriers would be eliminated, and the state line would no longer represent the limit of technological delivery systems. It was going to take the political will of every one of the governors, Leavitt suggested, to fight the public policy battles necessary to get it done.

Governor Romer of Colorado stepped into this "raucous [and] highly charged discussion" and called the idea that was taking shape the biggest that he had heard in his years of public service (Interviews). He then proceeded to make it even bigger. Romer argued that the governors should collaborate not just on delivery, but on reforming the entire system so that the "focus [would be] on whether learning has occurred, not on who provided the learning, the credentials of the provider, or how long a student sat in class"

(Leavitt, 1996, p. 16). He described the problem not only as improving student access to learning, but improving quality as well. Technology could solve the access problem, as Leavitt had suggested, by increasing the capacity of the existing system. Competency assessment, on the other hand, could be used to improve the quality by making the system more performance-based. Romer suggested creating a "charter university" to serve as the model for change (Interviews).

This became the kernel of a "revolutionary" shift in the governors' thinking (Interviews). Up to this point, the talk was about connecting existing distance learning networks already in operation in the states. Leavitt's vision was of a "glorified, coordinated, distance learning effort with colleges and universities accepting credits from each other" (Interviews). He presented the barriers of bureaucracy, tradition, and regulation as problems of state policy just as much as they were problems within higher education. Romer, however, shifted the blame for these barriers away from the states and put it squarely on higher education. Academia was what needed to change, and the governors ought to make sure that happened (Interviews).

Simply modifying the delivery system would not be enough. More people would have access to higher education, but unless they were learning what they really needed to know, it would have little value. Colleges and universities need to work with business and industry to educate a competent workforce, Romer argued. Institutions should be able to assess and credential learning that occurred outside as well as inside the classroom, and be able to say what a student knows and does not know. The innovation of competency-based education, Romer suggested, when coupled with making higher education more widely accessible through technology, would make colleges and

universities "right for the next century" (Interviews).

This was not a new position for Romer (Interviews). He had been talking about education issues for years, most recently during his just completed chairmanship of the Education Commission of the States (ECS). During his year as leader of that organization, Romer focused his agenda on quality in undergraduate education. In a report that ECS had just published (Romer, 1995) he was rather critical of the current state of American higher education. "I am troubled," Romer wrote in that report.

> There is a growing body of evidence from the National Adult Literacy Survey, from employers, and from students and institutions themselves, that a college education guarantees neither the basic skills nor the habits of the heart and mind expected of well-educated individuals. (p. 1)

His ECS report outlined a three part proposal that involved focusing on the learning experience, developing better alignment with state priorities, and making colleges and universities accountable for student outcomes. Romer worried, however, that higher education would not respond. "Too much of higher education," he wrote, "has become rutted in patterns that are not very responsive to the public or its leaders. ...Support already has begun to fade among some leaders and will continue to fade until we acknowledge and act on the underlying challenges" (Romer, 1995, p. 3).

Romer presented Leavitt's proposal at the meeting as the governors' opportunity to act. This would be a direct challenge to the complacency of traditional colleges and universities (Interviews). Competencies, assessments, and a focus on learning would ensure that degree requirements were responsive to the skills employers were demanding, and reflective of what students would need to know to succeed in the workforce. With this initiative, the governors could "create an institution with different ground rules" (Interviews) . They could "raise the bar" for what was acceptable and demonstrate a new

way of defining high quality in higher education (Interviews).

The notion of creating an independent "virtual university" based on the ideas of Romer and Leavitt took hold in the meeting, with Romer's competency-based degree becoming the rallying point (Interviews). One governor likened this concept to encouraging the archetypical industriousness and motivation of Lincoln with his legal studies. Others pointed out that it supported the values of the American west: independence, self-reliance, and the rewarding of individual effort (Interviews). Promoting competencies through this initiative was attractive to all the governors. A competent graduate was an employable graduate. And in economic development terms, that was what was important.

The final consensus of the meeting emerged. The governors agreed to put their "collective political muscle into this" and to rearrange the schedule for their winter meeting, scheduled for late November in Las Vegas, so that the idea could be fully addressed in a public session (Interviews). A competency-based virtual university would be a direct challenge to colleges and universities in their states, and they wanted the higher education establishment to know they meant business. Leavitt and Romer became the lead governors on the project and assigned the WGA staff to do the background work and coordinate the details of the Las Vegas discussion. There was no written resolution or formal vote taken -- just a group of eleven governors nodding their heads in agreement.

The Las Vegas Meeting

Planning for the meeting took place over the next five months. Led by Tom

Singer, Director of Research for the WGA, the process was handled much the same as any other initiative by the governors (Interviews). The WGA had project managers for the major areas in which the governors were typically involved: environment, land and water use, regional economic development. Projects "that aren't easily categorized" were assigned to Singer who was responsible for tapping into whatever outside expertise was needed (Interviews). Since the WGA had little experience with higher education issues, the Western Interstate Commission on Higher Education (WICHE) was pulled into the planning.

WICHE was founded by the governors as an interstate compact in the 1950s -- three decades before the WGA itself was created -- to encourage and facilitate resource sharing among colleges and universities in the western states. Most of the WGA states were members, funding for its core activities came from the states, and the WICHE Board of Directors were gubernatorial appointees. Because of this, the governors thought of it as "their" organization, and they expected it to respond to the educational needs of the region (Interviews). The governors, having decided in Park City that a virtual university was such a need, assumed WICHE would staff the project under the direction of the WGA.

This decision had a practical side to it as well. WICHE had been active in areas directly related to the governors' new interest, specifically through its Western Cooperative for Educational Telecommunications (the Cooperative). Established as a sub-group of WICHE in 1989, the Cooperative was a membership-based organization primarily made up of colleges and universities involved in the use of technology in education. At the time of the Park City meeting, the Cooperative was involved in two

federally funded projects which were very similar to what the governors had proposed. First, it was in the middle of a three year project designed to reduce state policy barriers to the electronic delivery of higher education programs (Western Cooperative for Educational Telecommunications, 1995). And second, it had started the Western Brokering Project, a program to make higher education more accessible to underserved students in the region through the use of existing distance learning networks. These two projects were so similar to the governors' plans, in fact, that some observers assumed that the governors were interested simply in expanding WICHE's role along these lines (Interviews). But the staff at WICHE recognized that the decision had been made to create something new rather than expand what already existed. They approached the Las Vegas meeting hoping to demonstrate what they had learned during the six years the Cooperative had been in existence, and to provide models for collaborative action that the governors could consider (Interviews).

The Director of the Cooperative, Sally Johnstone, was the lead person at WICHE for the Las Vegas meeting. Johnstone was involved in founding the Cooperative in the late eighties, and had served as its Director since its inception. She was well-known among those interested in distance learning and the use of technology in colleges and universities, and had been a consistent advocate of expanding the role of technology to provide access to higher education. Johnstone's participation in the planning of the Las Vegas meeting reflected the understanding on the part of both the WGA and WICHE that technology -- rather than competencies -- was the central component of the governors' virtual university proposal. Singer at the WGA assigned Johnstone and her staff the task of developing a set of options for the design of this new "high-tech" institution (Brown,

1995; Interviews).

Three options were identified (Western Governors Association, 1995c). The first -- a "virtual catalog" -- was conceived as an expansion of the Cooperative's brokering project. A regional coordinating board would be created to enable the sharing of distance education courses across state lines. The courses would be delivered by colleges and universities through existing networks, and participating institutions would agree to accept credit awarded through the system.

The second option was called the "virtual university." This would be a new institution which would design degree programs to meet the educational needs of the region. It would then establish a credit bank so that students could take courses at a distance from multiple providers and apply the credits toward a virtual university degree. Like the virtual catalog option, the virtual university would work with existing institutions, but it would also encourage other private providers to supply courses to meet the requirements of the new degrees.

The third option was the "Next Generation University," so named because it was conceived as the next step in the evolution of higher education -- liberal arts colleges being the first generation and land grant universities the second (Western Governors Association, 1995c). This would be a new regional institution that would encompass the functions of the previous two options, but would also assess student learning and grant degrees based on demonstrated competency rather than accumulated credit. The Next Generation University was deemed the "radical" option which represented the competency-based virtual university being pushed by Leavitt and Romer (Interviews). The majority of the Las Vegas meeting was being designed by the WGA to be a

discussion of this third option.

While the technology and distance education agenda for the Las Vegas meeting was clear to the staff at WICHE, they did not have the background to tackle the competency component of the governors' plan. Luckily Dennis Jones and Peter Ewell, two nationally recognized experts on the subject, were literally right next door. Jones was President and Ewell a senior associate at the National Center for Higher Education Management Systems (NCHEMS). NCHEMS was at one point a part of WICHE, but they had split some years before, and both organizations still had their offices in the same building near the University of Colorado campus in Boulder. Not only did Jones and Ewell have extensive experience with competency assessment, but they were also a known quantity with Governor Romer, having worked with him on, among other things, the earlier ECS report (Romer, 1995). Jones in particular was close to Romer. The two men spoke regularly about education reform and how competencies could be used to further that agenda. When Johnstone asked NCHEMS for help on the competency angle, Jones volunteered to write a position paper for the meeting based on his familiarity with Romer's perspective on the topic.

While WICHE was putting together the content for Las Vegas, the staff at the WGA was dealing with the logistics. The "rule" at the WGA for meetings of this kind was that they be "balanced, open, and inclusive" (Interviews). The "open" and "inclusive" mandates were handled through the guest list. It was drawn up to reflect the people who "you need to influence if you were going to change the way that higher ed. operates. Who needs to be a party to this new thing and who do we want included?" (Interviews). Representatives from the higher education community were targeted, with

each governor specifically inviting a senior higher education official in his state. To represent the interests of the private sector, the CEOs of several technology and telecommunications corporations in the west were also invited. Open and inclusive, maybe, but the governors had other ideas when it came to balance. They really wanted to "stir things up" at the meeting, and the WGA organized both the agenda and the physical space of the room with that in mind (Interviews).

In late November 1995, eleven governors interested in the project met in Las Vegas for the WGA's "Higher Education and Technology Leadership" meeting (Western Governors Association, 1995b). The room was set up for a prize fight. The governors, higher education representatives, and executives were sitting in a "ring" in the middle, and there were about 250 spectators in sloping seats surrounding them. They literally wanted to bring to mind the Ali-Frazier fights of the seventies (Interviews). This was not a subtle message, and it certainly was not "balance." The governors had plans to deliver a knockout blow to higher education at this meeting. Not able to meet the needs of the future, higher education was, according to materials included with the agenda, "absurdly outdated" (Prowse, 1995). The governors were going to propose a competency-based virtual university to serve as a model for a new direction (Western Governors Association, 1995b). There was going to be no real debate over the end result. The intent of the meeting was to lay out the arguments for "why higher education needs to change," and they expected endorsement of their new model. Higher education was in the ring, but everyone knew they were expected to take a dive. (Interviews; Western Governors Association, 1995c).

The day-and-a-half long event began with a forward looking discussion of the

possibilities of technology to improve access to all government services, not just education (Western Governors Association, 1995b). This was the broader SmartStates agenda that Leavitt was promoting as an umbrella activity for the WGA. The industry executives talked about the state of the art in their fields and what advances they saw on the horizon. Having a billion people networked was the direction that Novell was heading, for example. Unisys emphasized how inexpensive technology was becoming. A telecommunications company was looking at cable modems and the power of the internet to put "citizens on-line, not in line" (Western Governors Association, 1995b). Finally, Leavitt introduced a new SmartStates web site that would "knit the region together" and serve as an information sharing forum and database of states' activities in technology applications (Western Governors Association, 1995c). These presentations were teasers to the main event, however. As Governor Nelson, Chairman of the WGA and the meeting, stated in his introduction to the session, "If we are going to capitalize on the information age, if we are going to get from higher education whatever we need and require, we need to come together to do exactly what we are doing here" (Western Governors Association, 1995b).

The bulk of the meeting was devoted specifically to higher education issues and the Leavitt-Romer concept of a virtual university. Nelson first laid out the reasons driving this initiative. There were four: a) Because of competing needs, there is less money available from the states for education; b) The costs for higher education continue to rise; c) There is a changing environment of both students' needs and employers requirements; and d) new information technologies available for the delivery of education are currently underutilized (Western Governors Association, 1995b). Leavitt next talked about the

increasing enrollments that he was facing in his state. “I’m sorry,” he said, referring to tight budgets. “The money does not exist to build our way out of this problem” (Western Governors Association, 1995b).

A WICHE staff member marshaled the evidence for this bleak financial outlook. The written materials from the organization noted, “[A] better understanding of the factors affecting state funding of higher education leads to the inescapable conclusion that a return to some imagined state of ‘normalcy’ in funding is impossible, and higher education must change significantly” (Western Governors Association, 1995d). Leavitt and Romer endorsed this in their comments, sending the message that “the status quo in higher education is untenable, and new ways of doing business must be found” (Western Governors Association, 1995c). The proposed new way would be, of course, a regional virtual university.

WICHE briefly outlined five goals for the virtual university (Western Governors Association, 1995b), suggesting that it should “respond to student/employer/societal needs ... focus on student learning ... improve student access ... emphasize economy and cost-effectiveness [and] develop the states’ technology infrastructure” (Western Governors Association, 1995d). These generic phrases were not representative of any needs analysis conducted by WICHE, but rather were simple restatements of what Leavitt and Romer sought to achieve with their initiative.

Based on these five goals, WICHE presented their “continuum of possibilities” for the design of this new institution (Western Governors Association, 1995b). The virtual catalog and the virtual university options were presented in quick succession. It was noted that these would be relatively easy to implement because many organizations

and institutions -- including WICHE's own brokering project -- were moving in that direction already (Western Governors Association, 1995c). But these options were dismissed as being insufficient. They would not reduce costs, address issues of accountability, nor rely on demonstrated competencies. A major strike against these options, too, was that they would not require "significant institutional adjustment" for implementation (Western Governors Association, 1995d). The presentation made it clear that neither the virtual catalog nor the virtual university went far enough for the governors. They wanted something that would really shake up current practice, and meet their agenda for change.

The governors clearly preferred the option at the far end of WICHE's continuum: the Next Generation Virtual University. A draft agenda for the meeting suggested that the discussion of this option should emphasize "its ability to better meet stated goals" of increasing access, saving money, and improving educational quality. (Western Governors Association, 1995c). Even the title reflected the status the governors were giving it. This was, in fact, the future of higher education. The governors acknowledged that this approach would be "controversial" (Interviews), but that only seemed to make the possibility of creating such an institution more appealing. Discussion of this option dominated the last half of the meeting.

The discussion focused on two main questions. How would the Next Generation Virtual University maintain and promote high-quality educational standards? And how would issues with accreditation be handled? (Western Governors Association, 1995b). The second question had a direct answer from the governors' perspective. If the accreditation community placed roadblocks in their path, the governors felt they had the

political power to bypass accreditation altogether. Governors Leavitt and Romer both emphasized this. Having a group of governors come together over this made the virtual university too big to ignore. The accreditors would either have to work with the governors on these new definitions of quality, or be seen as obstructionists and defenders of an outdated status quo (Western Governors Association, 1995b). The governors already expected resistance, and spent a good portion of their time lambasting the accreditors for stifling innovation. Accreditation issues could be handled, they suggested, by dismantling the accreditation framework itself (Western Governors Association, 1995b).

To answer their question regarding educational standards, they turned to the paper on the role of competencies in a virtual university that Dennis Jones of NCHEMS wrote at WICHE's request (Jones, 1995). Jones argued that "the key feature of the 'virtual university' is less the delivery of instruction through the use of technology, but the formal recognition of learning achieved in this manner" (1995, p. 1). Technology-based delivery systems are already offering distance learning courses and instructional modules; thousands of students have taken advantage of this method of education. On the other hand, our current institutionally-based indicators of quality, he suggested, have not been able to adequately measure the learning acquired through these non-traditional means. On-line courses were still suspect, and the students' learning remained unrecognized and unrewarded, even though certainly "knowledge has been acquired and proficiencies in certain skills achieved" (p. 4). This situation would remain so until a better method of quality assurance was developed.

Jones (1995) offered four features of a "solution" to this dilemma (pp. 5-7). First,

"the focus must be on an assessment of learning;" second, "this assessment [should] be based on competencies as the basic unit of academic accounting;" third, "a requirement that specific 'packages' of competencies -- knowledge, skills, and experiences -- be assessed in such a way that they can be combined into generally recognizable awards (certificates or degrees);" and finally, the assessment "must have the acceptance of end users and be conducted with complete integrity." With this outline, Jones made the governor's case for quality in a competency-based virtual university. And, using Romer's own phrase, Jones argued its reform potential:

> Independent certification can potentially serve the function of a 'charter university' -- an organization that is not intended to supplant existing institutions, but to encourage them to change. If standards-based education can be proven to work outside the ivied walls, there is little reason to maintain that it couldn't work inside as well. (Jones, 1995, pp. 8-9)

If any doubt existed before the governors came into the room, none existed now. Objections raised by members of the audience were dismissed. Someone suggested that the challenges were "overcome-able", and that an existing organization such as WICHE could handle it. "WICHE is not the organization," Romer said. "If it were, the organization would have brought this to the table, rather than the governors" (Western Governors Association, 1995b). An accreditor in attendance, saying that she was "feeling a bit beat up here," offered several examples of how the accreditation community was working on distance learning and interstate collaborations already: "We will do our best to make you understand that we are not barriers," she said. Again, Romer would have none of that.

> We are not talking the same language, we are not on the same track. Everything you described was relating to distance learning delivering of product through the existing institutions and then giving credit and a badge for it because you are enrolled and certified there. The fundamental revolution at the table is not that discussion. The

> fundamental revolution is that people are learning all over America in Novell and everywhere else that are not related to an educational institution. And we have got to find a way to allocate public policy and resources to encourage that and to acknowledge that. And you see, I really appreciate your sincerity, but you are speaking in a different world. We need to find a way that you begin to understand the world that we are describing here today, and I'm not trying to be hard here, but I just want to say that your total description describes to me that we have got a real barrier because we are not talking about the same story. (Western Governors Association, 1995b)

Faced with such an onslaught, there were few people who would challenge the governors on their agenda, or venture more temperate solutions. In this atmosphere, Leavitt was able to note early on that "a consensus [is] building here" (Western Governors Association, 1995b). Telling the story once again of his meeting with Clara Lovett in Arizona, he suggested that breaking through the three barriers she named was the entire point of this effort and the reason for the governors' involvement.

> That's our job. That's what we bring -- Governors -- that's what the Governors bring to the table. There is no technological barrier to our doing this. And if we have a problem with the accreditation organizations, it seems like to me we pay the bill for those and we ought to go see them. We don't need to reject them out of hand, but we ought to tell them that we are your customers, and you are not meeting our needs. If we have a problem with having credit transferred, it seems to me that I appoint the Board of Regents in my state and I ought to have a discussion with them about that. That's our job. I don't understand the technology, but I think I understand politics. (Western Governors Association, 1995b)

The sense of the meeting was summed up at the end by Lewis Perelman, a well-know writer on issues of technology and learning (e.g., 1992). Commenting on why this was the first time he had spoken, he noted that he was in the unusual position of being in complete agreement with everything that was being said. He was amazed at it all. "This is the most exciting, truly revolutionary, political meeting I have either attended or heard in a quarter century," he said. "Something of really extraordinary historical importance is happening here" (Western Governors Association, 1995b). Governor Nelson concluded

simply by remarking, “This has been outstanding.”

At a business meeting later, the eleven governors in attendance voted unanimously to appoint a task force and design team to move the idea forward. It was less than a year after Leavitt’s conversation with Clara Lovett in Arizona, and six months after he first broached the topic with his fellow governors. With Romer as his vociferous partner in Las Vegas, Leavitt had taken the first step toward creating a new distance learning institution -- one with competency assessment as a critical component. The Leavitt-Romer vision for the future of higher education was ready. “If we make this a priority,” Leavitt said, “we can make it happen” (Western Governors Association, 1995b).

Vision Statement and Work Plan

Work began immediately to make it happen. The WGA’s charge from the governors was to “develop a work plan to produce actionable recommendations by the June, 1996 WGA Annual Meeting” regarding the creation of a Virtual University (Western Governors Association, 1995d). A Steering Committee was appointed by the governors to oversee the effort. Each governor named one representative, most choosing someone from higher education at the campus or system level. Among the first steps taken by this group was to select Jones of NCHEMS as a design team member and the primary contractor for the project (Interviews; Quinn, 1996). Jones was tapped to write both the vision statement and the work plan for the virtual university. These documents would be presented at a press conference in February during the winter meeting of the National Governors Association (NGA) in Washington, DC (Quinn, 1996).

Jones wrote the vision statement and work plan by early January. They were sent out to Steering Committee members for comments, specifically asking whether there was "anything the Governor can't or shouldn't support" (e.g., Gilbert, 1996). The responses were generally positive and the changes in the final drafts were more in tone and word choice than in concept or fundamental direction. Jones' work was combined into a single document and became the first formal statement of the governors' intentions. Entitled From Vision to Reality: A Western Virtual University, it was released by the WGA during the governors' press conference on February 6, 1996 (Western Governors Association, 1996b).

The vision that Jones wrote for the governors emphasized the dual roots of the idea: Leavitt's technology-based, SmartStates initiative as an answer to financial and enrollment pressures; and Romer's competency-based, workforce development perspective as a catalyst to higher education reform (Interviews). The opening paragraphs melded their two philosophies in summarizing the argument for action. It began:

> All western governors are feeling the press of increased demand on their state systems of postsecondary education. All recognize that the strength and well-being of both their states and the nation depend heavily on a postsecondary education system that is visibly aligned with the needs of a transforming economy and society. At the same time, the states' capacity to respond to these challenges is severely constrained by limited resources and the inflexibility and high costs of traditional educational practices and by outdated institutional and public policies. (Western Governors Association, 1996b, p. 1)

The "challenges" could be met, the document continued, by turning to advanced technology as the means to make education broadly available to the population -- meeting the demand -- while at the same time focusing on competencies as a way of directly addressing society's economic needs. It was expected that this effort would reduce the cost of higher education, making it less expensive for states to provide as well

as more affordable for students to pursue. Additionally, the virtual university could "improve the quality of postsecondary education" and demonstrate "new approaches to teaching and assessment that can be adopted by more traditional colleges and universities" (Western Governors Association, 1996b, p. 1). Finally, there was a somewhat convoluted nod to SmartStates:

> More broadly, the governors want to better link educational and business opportunities by ensuring that state investments in and use of information technology contribute to a technology-rich environment within which private industry can function and on which it can depend. Specifically, they feel that higher education has the potential to serve as an anchor tenant to spur the development of information technology networks within and among states in the West. (Western Governors Association, 1996b, p. 1)

The vision statement was short on detail. What it did give was a short vignette of a fictional couple, Bob and Sarah Allen, which described how the virtual university might be used. The story focused on how living in a rural location did not mean that one would miss "having a first-rate higher education system close at hand" (Western Governors Association, 1996b, p. 2). Bob could hire workers with the appropriate competencies in C++ programming for his software company, and Sarah could enroll in a youth counselor certification program. "For the Allens," it concluded, "living in a small community far from the nearest university no longer was an impediment to pursuing their educational or economic goals, Affordable, accessible higher education -- that is the vision of a western virtual university" (p. 2).

Admitting that much of the organization and structure of the institution was still to be determined, the vision statement presented a set of eleven criteria that would guide the design of the virtual university (Western Governors Association, 1996b, pp. 3-4). To satisfy the governors, the institution must be:

- market-oriented -- focused on developing markets for certified graduates and a wide variety of instructional materials;
- independent -- not controlled by those who represent established interests with regard to either the delivery of education or its certification;
- client-centered -- focusing on needs of students and employers rather than instructional providers, e.g., flexible and responsive in instructional delivery rather than constrained by the fixed schedules and sequential structures typical of current educational delivery;
- degree-granting -- empowered to grant certificates recognized by employers and degrees recognized by both employers and the academic community, initially in a limited number of areas, but ultimately from associate to the graduate level across a broad spectrum of fields;
- accredited -- fully accredited by regional and appropriate specialized accrediting bodies for the degrees and certificates it bestows;
- competency-based -- grounding the certification of learning on the demonstration of competency rather than the accumulation of credits or experiences, or judgments about the quality of providers;
- non-teaching -- not providing instruction directly, but drawing upon needed capacity wherever it exists, both in colleges and universities, and in the private sector and among individual experts as well;
- high quality -- setting competency expectations for certification that will help raise levels of quality for all learners and providers;
- cost-effective -- sharing information technology infrastructure, seeking other economies of scale, forging partnerships, drawing on existing educational resources, and reducing time to degree to the fullest extent possible to reduce the per-student costs of delivering instruction;
- regional -- offering opportunities for participation to states throughout the West in a manner that is flexible and adaptive, and interconnected in ways that follow regional economic and social interest; and
- quickly initiated -- not requiring lengthy study and developmental work but actually functioning and delivering benefits by the summer of 1997. (pp. 3-4)

To meet the criteria of "quickly initiated," the workplan for the next few months was described in the second section of the document, and a timeline for development was given (pp. 5-12). The project would continue to be organized under the direction of the WGA, with a small design team responsible for core activities. Governors and "leaders in industry, academia, participating corporate supporters and other interested communities" would make up a regional advisory group to provide leadership and direction to the design team's efforts. Interested governors could also set up state advisory committees to

assist in local arrangements. A “detailed conceptual design for a regional virtual university” (p. 11) would be presented to the governors for their approval in June at the WGA summer meeting in Omaha, Nebraska.

Creating the Design

The design team had already been formed and was ready to begin full-scale work on the project as soon as the vision statement and plan was accepted. NCHEMS and WICHE became the main consultants for the project, and Dennis Jones and Sally Johnstone represented their organizations on the design team. All the others, however, were members because of their responsibilities to the governors. LaVarr Webb and Anne Quinn, aides to Leavitt and Romer respectively, were there to represent the governors’ founding interest in the project. Jim Souby, Executive Director of the WGA, participated because it was a major project for his organization and he was accountable to the governors for its implementation. Tom Singer, the project director and official convener of the design team, was assigned by Souby to coordinate the effort at the WGA.

One final design team member who did not fit neatly into this category was Jeff Livingston, Leavitt’s Executive Assistant for Higher Education Technology -- a position created specifically for him after the Las Vegas meeting (Office of the Governor, 1996). In addition to working with Leavitt, he was the Associate Commissioner for Technology for the Utah System of Higher Education, and had held academic and administrative positions in several western universities. Not just a government appointee to the design team, Livingston was an advocate in his own right for distance education in colleges and universities. He had been on the Cooperative’s steering committee for several years, and

consequently was familiar with the work on distance education Johnstone and her staff had been doing prior to the governors' initiative. While his participation in the virtual university project was made possible by his position with Leavitt, he had a professional interest in the idea and was committed to its success.

Leavitt and Romer maintained overall control of the design process. Not only did they name the members of the design team and inform the WGA who would be hired as contractors for the project, they also personally reviewed work products and preliminary reports as they were produced (Interviews). Singer, while nominally in charge of the initiative at the WGA, did not lead it. Leavitt and Romer, supported by the staff at WICHE and NCHEMS, were the central players. And while thirteen other governors expressed formal interest in the effort, most did not take an active role in the planning. They relied on their appointees to the Steering Committee, named after the Las Vegas meeting, to represent their states. Only two governors, besides Leavitt and Romer, played a significant role in the design of the new institution: Governors James Geringer of Wyoming and Benjamin Nelson of Nebraska.

Nelson, a second-term Democrat, inherited the virtual university project after the Park City meeting when, following Leavitt's term, he became chairman of the WGA. Simply because of this role, he was involved in planning and budgeting the design phase of the new institution, and he chaired the public meetings where the various phases of the idea were presented and discussed. Despite being from a different party than Leavitt, the two governors had much in common. They both were wealthy executives in the insurance industry, neither had held elective office before becoming governor, and they made states' rights a major focus of their terms in office. In fact, Leavitt and Nelson were the

sponsors in 1995 of a controversial multi-state conference aimed at reasserting the power of the states in setting federal policy (Associated Press, 1998).

In addition to Nelson's personal and political connections to Leavitt, he also agreed with Leavitt's perspective on the use of technology in higher education -- but for different reasons. Leavitt was motivated by Utah's growing population and an unwillingness to finance the construction of new campuses to meet the increasing demand for education. Nelson, however, was influenced more by the geography of his state. Nebraska is over 400 miles wide with most of its population concentrated in a few metropolitan areas in the eastern third of the state. The separation felt by the rural population in the west had long been a political issue in Nebraska. As governor, Nelson had made "One Nebraska" the theme of his administration and had committed significant resources toward making "geography irrelevant" through the use of telecommunications (Miller, 1996). He focused his attention on expanding and updating the distance education network that had already been established by the postsecondary system in Nebraska. A pioneer in the field, initiatives such as the Great Plains Network and distance degree programs by the University of Nebraska went back more than a quarter century. Distance education in Nebraska connected the academic resources of the population centers in the east, to the outlying rural areas in the west. Because of this, Nelson took a different view of the relationship the proposed virtual university should have with existing institutions of higher education.

Leavitt and Romer had proposed an institution that would be a competitive challenge to traditional higher education through its use of technology and competencies. Nelson wanted to make sure this did not threaten the colleges and universities that, like in

his state, had already devoted significant energies toward developing their own capacity for distance education. From his leadership role in the WGA, he suggested that the focus should be on using these existing resources and existing faculty to extend the reach of the campus. Just as in Nebraska where the programs originated from the University campus in Lincoln and were then distributed across the state, this new virtual university could serve as a distance education distributor for universities across the region. Competency-based degrees could still be offered and programs designed around the needs of industry, but the instruction would come from existing institutions. While some viewed his as a "stabilizing voice" among the governors (Interviews), it was more in style than in substance. The end result would be an institution essentially the same as what Romer and Leavitt were advocating. Nelson, however, thought that existing universities -- at least the ones he knew in Nebraska -- should be encouraged to participate, rather than dismissed as outdated and irrelevant.

James Geringer, Republican Governor of Wyoming, became involved in the planning of the project more out of personal excitement for the idea rather than from any formal responsibilities within the WGA. As a technology enthusiast -- he was an engineer and computer programmer for various space programs in the seventies, including the Viking Mars landing, the Global Positioning Satellite System, and the space shuttle -- Geringer saw the potential of distance education to meet the needs of Wyoming's far-flung population. When he became Governor in 1994, improving Wyoming's telecommunications infrastructure was a top priority, beginning with his own office. In his first year, Geringer inaugurated the State of Wyoming's home page on the internet, networked the computers in the Capitol, and established email communication within the

government. To support education, he also began setting up a state-wide compressed video network that would connect the single four-year public University to the seven community colleges in the state.

Wyoming is a large, sparsely populated state. And, unlike Utah, Colorado, and much of the rest of the west, there was little worry about the impact of future population growth. Lack of population was more of an issue, and Geringer was concerned with his state's ability to attract new businesses into remote areas. Having relied heavily on the oil and gas industries in the past, Wyoming was beginning to diversify its economy in response to declining energy prices. The small towns throughout the state needed access to training and educational opportunities to be competitive. The new video network could help provide some of that access, but providing education to such small numbers of students was expensive. Economies of scale with technology could only be achieved if the potential student population for Wyoming's programs could be expanded beyond the state line. The state needed to "import students from other states" in order to have a sufficient market for its programs to make them available to its own citizens (Interviews). Having more and better education and training programs in Wyoming would not only encourage more employers to relocate to the area, it would also give students a reason to stay in the state after graduation, start their own companies, or join the local workforce.

Competency-based distance education was, from Geringer's perspective, the perfect combination to address the educational and business needs of his state. He wanted the virtual university to be entrepreneurial -- to create a "demand-driven education process, not a supply-driven education process" (Interviews). Geringer felt that colleges and universities should have more interaction with the private sector, find out what the

needs of business are, and then design programs that will meet those needs. The virtual university could serve that purpose, responding to industry demands rather than simply supplying more graduates. In this way, the virtual university could serve not only the growing and changing student population anticipated by most western states. It could provide access to an education appropriate for a growing and changing economy as well. The economic motivation for the new institution was, by comparison, a more pressing need for his state, and Geringer's involvement was intended to ensure that this component of the virtual university would not be lost in the planning process.

The direct involvement of these four governors and their staff circumscribed Singer's role as the manager of the virtual university project. And, as someone who had never worked on educational policy before, he had to defer to the expertise of the consultants on those matters. He had an academic background in entrepreneurship and business finance -- Ph.D. from George Washington University -- so Singer was interested in the market analyses, product definition, "and all of the things you do when you do business plans" (Interviews). But because of the looming deadline of the summer meeting in Omaha, these areas barely received attention. The governors -- represented by Romer's aide, Anne Quinn, and Leavitt's aide, LaVarr Webb -- were interested in making sure an implementation plan was offered at that meeting which met their design criteria. WICHE and NCHEMS, along with Livingston, were concerned with how to make sure that plan "would succeed in the higher ed. environment" (Interviews). Johnstone and Jones assured Singer that the market was there for this competency-based virtual university. The challenge would be to present a plan in Omaha that demonstrated that such an institution could technically be constructed, and that it would have value to stakeholders in both

business and the academy.

The workplan to achieve this was laid out in the vision statement presented in February, and modified slightly by the design team afterwards (Singer, 1996). The tasks were divided between NCHEMS and WICHE, with Dow, Lohnes, and Albertson (DLA), a District of Columbia law firm, brought in later by Sally Johnstone to work pro bono on some of the legal and organizational issues. Michael Goldstein, the lead person at DLA for the virtual university, had been involved for more than a decade with issues of interstate regulation of higher education, and had most recently written the introduction for the WICHE publication on state barriers to distance education (Western Cooperative for Educational Telecommunications, 1995). Goldstein joined the design team to identify "the things that would have to be dealt with when and if it actually went from being a brilliant idea to actually being an operating project" (Interviews). He, along with the staff at NCHEMS, was responsible for recommending to the governors an appropriate organizational structure for the multi-state institution, and specifying the formal role that the governors could and should play in the operation of the university they were creating.

The other tasks in the design plan matched the two consulting organizations' strengths -- competencies and technology. NCHEMS was in charge of developing the competency framework for the new institution and conducting an analysis of the policy issues that would need to be addressed in its implementation. WICHE was responsible for identifying "best practices" in the distance education realm -- including the provision of student services -- and creating a selection process for learning materials that would address the competencies identified by NCHEMS. WICHE was also responsible for constructing a model on-line catalog that would include the competency statements and

assessment procedures for the offerings of the virtual university (Western Governors Association, 1996b). At the June meeting of the WGA in Omaha, the results of these tasks and a recommendation for action were to be presented to the governors in the final implementation plan.

Together, NCHEMS and WICHE produced nine reports on these tasks -- plus the implementation plan -- between February and June 1996. WICHE reviewed 18 organizations involved in distance education and identified a wide range of potential models for a new virtual university. NCHEMS proposed a set of premises for the development of a credentialling system based on competency assessments and, after consulting with a group of representatives from the computer and telecommunications industries, recommended two skill areas on which the virtual university should focus. One, an electronics manufacturing credential, was selected because of its widespread need in the region. The second, a quantitative skills competency, was chosen because it would have applicability in both academic and employment settings (Jones, 1996). A sample set of performance descriptions was created for this latter skill area, and WICHE created a model Request for Proposal to solicit new learning materials related to this skill set. IBM was brought into the process to help WICHE design a demonstration on-line catalog which contained the sample performance descriptions and courses which would address them. And finally, NCHEMS, with the help of DLA, drafted a prospectus for the virtual university which outlined options for the governance, administrative structure and functions, and financing for the new institution.

All of this was brought together in a ten-page Implementation Plan. The prospectus served as the first draft of this document (Western Governors Association,

1996d), and it was presented to the regional advisory group for a "reality check" in early May 1996 (Western Governors Association, 1996c; Western Governors Association, 1996f). The design team apparently had done their job well, because there was "little disagreement" regarding the details of the virtual university (Western Governors Association, 1996c). The version presented was translated almost verbatim into the Implementation Plan. The only major changes involved a greater emphasis in the final draft on how the virtual university would augment Leavitt's larger SmartStates agenda.

The Implementation Plan concluded that a competency-based virtual university could "provide substantial benefits ... to all of its constituent groups" (Western Governors Association, 1996i, p. 3). Students would "have improved access to learning, with many of the obstacles of time and place removed." Employers could be assured that potential employees have the skills and competencies they need to be productive. Colleges and universities would have access to more students, especially in rural areas, and they would no longer be limited by their own geographic location. States would achieve the economies of scale they needed in order to make mass education affordable for their citizens, and would be able to "refocus attention on the critical issues of quality and competence" (Western Governors Association, 1996i, pp. 3-4).

Moreover, the research conducted in preparing the Plan had "established the feasibility of both delivering quality academic and vocational programming through advanced technology, and assessing the acquisition of the specified learning outcomes intended by the instructional programs" (Western Governors Association, 1996i, p. 5). The authors noted that questions of quality in distance learning came up often in their discussions with stakeholders. Rigorous competency assessments, they argued, would

best address these issues and ensure the "the highest level of quality" (p. 4) in the educational offerings of the virtual university.

The Design Team proposed a three part mission for the institution:

1. To remove the obstacles of both time and place to postsecondary education opportunities for individual and corporate citizens of the West by developing and demonstrating innovative, cost-effective approaches to delivering education through the use of rapidly evolving advanced technology.
2. To provide a means for learners to obtain formal recognition of the skills and knowledge obtained outside a traditional higher education (campus) context and/or from multiple providers through the assessment and certification of competency.
3. To encourage joint development of new learning and assessment materials among states and with private entities, and technology standards that ensure connectivity. (Western Governors Association, 1996i, p. 6)

In carrying out this mission, the Design Team proposed an organizational structure that included a small central operation, with local and regional centers "franchised" by the institution to provide on-site assessment and student services in each participating state (p. 7-8). The governors would participate as members of a new Steering Committee to guide the institution until it could incorporate as an independent, non-profit, and tax-exempt educational institution. While financing was a major issue that needed to be addressed, according to the plan of work proposed by the Design Team everything could still be up and operating by the second half of 1997 (p. 11).

The Implementation Plan represented the end result of the design process authorized in Las Vegas. The next steps would be taken by the governors at the summer WGA meeting in Omaha.

The WGU Begins in Omaha

Almost a year to the date after Leavitt's initial conversation with his fellow

governors in Park City, the final Implementation Plan (Western Governors Association, 1996i) was ready for their endorsement. The tasks that had been proposed only a few months previous had almost all been completed, decisions had been made about the organization and governance of the institution, and dozens of presentations had been made to various groups and organizations interested in the virtual university project. (Western Governors Association, 1996c). Feedback from various policy makers had been incorporated into the design, each state had been extensively consulted, and informal conversations had been held with members of the accreditation community. Perhaps most importantly, after debating over at least fifteen contenders (Israelsen, 1996; Western Governors Association, 1996c), a name for the new institution had finally been selected. The governors' virtual university would henceforth be known as the Western Governors University.

The Governors endorsed the Implementation Plan at their annual meeting in Omaha on June 24, 1996 (Nelson, Romer, & Leavitt, 1996). The plan was presented with great fanfare, with representatives from higher education and industry in attendance. Governors Leavitt and Romer gave what had become, and would continue to be, their standard stump speeches on the WGU (Interviews; Western Governors Association, 1996g). Leavitt talked about how the idea came to him during a conversation with Clara Lovett, and he listed the barriers that she identified. He quoted, however, in a bit of poetic license, four barriers from that conversation -- permanently adding 'turf' to the original three barriers of bureaucracy, regulation and tradition (Western Governors Association, 1996g). Romer focused on the competency angle, referring back to his own training as a pilot as an example of what was needed. They both emphasized the market-

driven nature of this and how it should be seen as, in Romer's words, "a wonderful companion [and] a wonderful stimulus" to the postsecondary institutions that already exist (Western Governors Association, 1996g).

The Design Team members, though they were sitting ready to answer any questions, never needed to say a word. Governor Geringer of Wyoming gave a fifteen minute demonstration of the WGU web site, walking through how a student could fulfill the competency requirements using the resources provided by the WGU. A corporate executive from Motorola spoke in favor of the competency assessments, saying that if he missed one product cycle because his employees did not know the latest technology, his company would go under. An IBM executive talked about the role of technology and telecommunications in education. The executive director of the Kellogg Commission and the chancellor of a community college both spoke in strong support of the governors' plan. And the CEO of Jones Intercable made the case for involving private educational providers in WGU's postsecondary offerings (Western Governors Association, 1996g).

The only break, minor though it was, in this mutual admiration society was from the head of Nebraska's flagship campus in Lincoln. Looking a little nervous with his Governor chairing the meeting, he suggested that the governors not ignore the new and innovative collaborations already occurring on campuses and via technology around the country. Partnerships with industry are happening right now, he argued. This new endeavor should work to support them, not supplant them. Governor Nelson of Nebraska said a few words in agreement, and then moved on to the more pressing business of building a virtual university (Western Governors Association, 1996g).

Governor Leavitt suggested that the governors think of this "as a business

venture. We have spent some money doing research and development and concluded that this concept is worthy of our further investigation and investment" (Western Governors Association, 1996g). He quoted Ray Noorda, the founder and CEO of Novell, on the notion of change: "You can fight it and die, you can embrace it and survive, or you can lead it and prosper." The west, Leavitt argued, was the leader in "the next wave of educational innovation. …I say in the west, we should lead it, and if we do, we will prosper" (Western Governors Association, 1996g).

A Memorandum of Understanding (MOU) was presented by Governor Leavitt for the governors' signatures. The MOU officially adopted the Implementation Plan, and committed the governors to providing "strong, visible, and effective leadership to assure cooperation among our states and with educational institutions and private industry and to secure a supportive policy environment" (Western Governors Association, 1996a). The tangible evidence of their commitment was financial support in the amount of $100,000 that each signatory state would provide to the WGU during the next fiscal year.

Collegiate sweatshirts emblazoned with the WGU seal were brought out for all the governors to don, and, with a call for the WGU cheer, "Go Megabytes!," Governor Nelson invited his colleagues to come to the front of the room and sign the MOU (Western Governors Association, 1996g). Utah's Mike Leavitt and Colorado's Roy Romer signed first, followed by the eight other governors in attendance: John Kitzhaber of Oregon, Gary Johnson of New Mexico, Jim Geringer of Wyoming, Fife Symington of Arizona, Edmond Schaefer of North Dakota, Mike Lowry of Washington, Philip Blatt of Idaho, and Ben Nelson of Nebraska (Western Governors Association, 1996a). With these ten states as charter members, the WGU had begun.

CHAPTER III

ENVISIONING THE WGU

For an institution founded on the principles of breaking through barriers and challenging the status quo, the WGU was strangely reliant on people from the higher education community for its existence. The staffs at NCHEMS and WICHE, organizations that had worked for decades with traditional institutions of higher education, did most of the planning and development for the new University. The people hired to be the directors of the WGU were academics with extensive administrative and faculty experience. Gaining the approval of the traditional accreditation community dominated the agenda of the new institution. Colleges and universities became the primary providers of academic content and the pilot consumers for the on-line catalog. Library services were contracted to a major research university. Administrative activities were handled by a team at a regional campus of Washington state's university system. Faculty from institutions across the West joined the WGU in developing the competency descriptions for the initial degrees, as well as validating the WGU's competency assessments and forming its academic advisory committees. Even at the Board of Trustees level, almost all of the governors initially appointed someone from academia to represent their state. Several even named the president of their flagship university.

For all the talk about creating an institution that would not be "controlled by those who represent established interests" (Western Governors Association, 1996b), that was exactly who became involved. Not only did the fact that so many from academia

participated in the development of the WGU represent in itself a modification of the original intent of the institution, but their participation also had a palpable effect on the eventual realization of the governors' agenda for the WGU.

The implementation plan approved in Omaha described two visions, three missions, four benefits, five roles, and 16 activities for the WGU. In this jumble, and mixed throughout the governors' rhetoric, several themes kept reappearing which can be thought of as portraying the original goals of the WGU: improving access to education and reducing its cost, encouraging competency-based degrees, and changing higher education -- all with advanced technology central to the process. This was "a big idea," as Romer was fond of saying (Western Governors Association, 1996h). Higher education could be organized, delivered and assessed in ways that were dramatically different, and significantly less expensive, than traditional methods. Rather than just issuing a report that made these bald assertions, however, the governors approved an implementation plan to bring them to fruition. The WGU was their chosen instrument of public policy. As the WGU moved from the rhetoric of vision statements and implementation plans, the reality of creating an actual university required the assistance of people with expertise in the design and delivery of academic programs. And the governors generally did not look too far outside the box for these individuals.

The effect of this on the development of the WGU was evident through three main changes which took place. First, promoting the role of advanced technology in the academic activities of traditional colleges and universities became less important to the broader mission of the WGU. Second, within the original set of goals the cost-savings rationale was de-emphasized, while the institution's mission of providing competency-

based learning and improving access to education was highlighted. And finally, those involved in developing the WGU began to back away from the notion that the institution was going to force a wholesale change in traditional higher education. However, despite such significant adjustments to the original vision, the "fundamental revolution" of the WGU as it was initially conceived by Leavitt and Romer (Western Governors Association, 1995b) remained intact. The WGU's focus continued to be on awarding competency-based degrees. It would not be a teaching university; rather it would take advantage of distance education resources provided by other organizations. And it would provide an alternative to campus-based institutions of higher education for students not well-served by the traditional model. The WGU as it actually developed remained a radical innovation.

The specifics of achieving that original vision, however, were open to interpretation. The influence of the academically-oriented people involved in the WGU was generally directed toward making the emerging institution more palatable to -- and less antagonistic toward -- traditional higher education. But before going into more detail as to the reasons for the changes which took place, an explanation of them is in order.

Technology

Technology was the driving force behind the creation of the WGU. Recall that the WGU was the first project of Leavitt's SmartStates initiative, a program that was designed to facilitate the development of common network applications on a regional basis. The Las Vegas meeting where the idea was first publicly presented was entitled "Higher Education and Information Technology" and the corporate representatives

invited to attend were all from the telecommunications industry. The original name for the initiative was Western Virtual University, and its logo was a floppy disk and CD-ROM.

By the time the implementation plan was approved in Omaha, however, there was a growing recognition that the 'virtual university' needed a name that better suggested its status as a full-fledged postsecondary institution. An early newsletter published by the WGA commented:

> A rose by any other name might smell as sweet, but the name 'virtual university' just doesn't cut it for what the western governors are trying to create. Governors, newspaper editorial writers, and college professors have all weighed in suggesting that the word 'virtual' sends the wrong message. (Western Governors Association, 1996j)

A 'virtual' education, so these pundits claimed, was not the same thing as a 'real' education -- that in some fundamental way, the new institution would only be an "almost university" which was missing something that traditional higher education had (Western Governors Association, 1996j). This perspective was common enough without the name of the institution serving as a reminder. The 'virtual university' was given the moniker 'WGU' in large part to avoid this semantic comparison, and to make clear that there was more to the WGU than simply using technology to deliver education. The new name was intended to portray the school as a real institution of higher education, named after both its home region and its founders as any other college or university would be.

The name change, though made ostensibly for the sake of public relations, was the beginning of a more fundamental re-adjustment for the WGU. The vision statement originally argued that the new university was necessary to provide "incentives" so that technology would be "more widely adopted" by traditional colleges and universities

(Western Governors Association, 1996b). Now, however, those implementing the governors' vision were recognizing that this technological focus was tangential to the WGU's core activity of operating as a university in its own right. The technology policy agenda began to be pushed aside as the institution developed. 'Virtual' was first to go, followed by the governors' futuristic accounts of the power of technology to replace the campus. The floppy disk logo was soon changed to the overlapping letters of the WGU acronym. By the middle of 1997, even the prefix 'cyber' was essentially absent from promotional materials and public statements. Technology began to be described by the WGU development team as an option that should be presented to students, and not anything that is inherently advantageous. Making this argument, one staff member declared that a technology-based institution

> does not present an absolutely better learning system than the campus. You just can't say that. You can give examples on the other side, but you can't make a blanket statement that distance learning is qualitatively better. I mean, I'm sorry. That is just not true. And we know that. We're not try to convince people of that. (Interviews)

They were trying to convince people, however, that the WGU was a real institution of higher education, and that it presented a legitimate model for providing high-quality education. The early focus on advanced technology distracted from that. It suggested what other institutions should do, as opposed to what the WGU was doing. It emphasized the mechanism of course delivery over the more important dimension of assessment of student learning. And it gave skeptics who opposed the spread of the distance education model a potent argument against the new institution (Interviews).

The WGU was still a distance learning institution. That had not changed. But, essentially by the summer of 1997, what had changed was that the WGU no longer sought to convince other colleges and universities that distance learning was a model

they needed to adopt. According to a member of the Board of Trustees, if some institutions and faculty did not want to use technology,

> That's OK. If you don't want to play, you definitely don't have to play. We'll protect your right not to play. We don't require everyone to play. In fact, we don't even have room for everybody. So if you're not comfortable, please don't worry. Just keep doing what you're doing. (Interviews)

The implication, of course, was that the WGU would keep doing what it was doing as well -- namely, taking advantage of all the distance learning that was already happening in traditional and non-traditional settings around the country. Since the WGU did not represent an expansion of distance education, it could present a more moderate image to traditional academia. And by toning down the high-tech talk, the WGU organizers felt they could fend off much of the criticism from academics who were made nervous by the earlier technological proselytizing. By only focusing on those institutions and faculty which were already involved in distance learning, it made the WGU seem all the more reasonable as an option. As one consultant put it, "It's hard to say this is really crazy if they're involved in doing it themselves" (Interviews).

Cost-savings, Access and Competencies

This move away from a technology focus allowed the WGU planners to concentrate on what the institution was actually going to do. The view of the consultants was always that the technology "would take care of itself, and that it wasn't really an issue." Rather, the issue was the "functionality that needed to be delivered through the technology" (Interviews). With technology disentangled from these functionalities, the actual performance of the WGU as an institution of higher education was the sole focus of attention. Of its original goals, two related to the educational ends of the WGU --

increasing access and promoting competencies -- and one related to the money that would be saved as a result. The last purpose, that of changing higher education, the governors expected to occur naturally in the course of the successful accomplishment of the previous three.

These first three goals, however, were just as open to change and adjustment as the focus on technology proved to be. Over the course of the WGU's development, the implementation team increasingly emphasized the goals relating to the education ends. The cost-savings outcome, on the other hand, became much less important. While competencies and student access had been important from the beginning, to minimize the potential financial implications of the WGU was a significant departure from the design documents. The original vision statement specifically listed "reducing the costs of providing [educational] opportunities" as one of the goals of a virtual university (Western Governors Association, 1996b). A memo to the governors from the WGA listed a number of questions that, based on the vision statement, they should be ready to answer. Among the questions: "Why do [the governors] believe there will be cost-savings associated with the virtual university?" (Souby, 1996). And the implementation plan concluded that "the WGU can provide significant benefits to all of its constituent groups at lower cost than current approaches" (Western Governors Association, 1996i).

What became clear, however, was that the emphasis on saving money called into question the governors' commitment to educational quality (Interviews). This was, in fact, a common sentiment held by many of the WGU's critics. "Quality is never cheap," was how one higher education leader put it (Interviews). Another stated that, in his opinion,

> the strongest motivation driving [the WGU] has been saving money. The motivations of the leaders -- the governors of the states -- typically their motives are not high-handed or at a high-level, in the sense of wanting to serve more students or improve quality. [The governors] want to do this at less cost so that [they] can spend money on other priorities. They are not blind to the costs of say, the British Open University, which has its costs driven down to, I don't know, something like five hundred dollars per FTE or something like that. And so they look at those kinds of things and conclude, wow, let's get kicking here and let's get something put together. And so I do have a certain concern about the way it will all be carried out, because of what I perceive the motives to be. (Interviews)

The implementation team responded the same way to this concern as they did when they met with resistance to the emphasis on technology. They simply changed the focus. By mid-1997, an executive summary of the vision and purpose behind the WGU did not mention cost-savings at all (Western Governors University, 1997g), nor did a public update on the WGU initiative a couple of months later (Livingston & Albrecht, 1997). When the possibility of saving money was mentioned, it was often with a caveat: "The WGU should not be expected to, nor indeed should it, reduce state support for higher education; rather, the funds expended will be more efficiently used" (e.g., Western Governors University, 1997d). Other presentations by the WGU staff would phrase the same point as "minimizing the costs of replication and duplication," discussing it almost exclusively in terms of "cost-effectiveness" (Interviews; Livingston, 1997a).

Cost-effective as a descriptor actually went back to the vision statement. In that document it was defined as "sharing information technology infrastructure, seeking other economies of scale, forging partnerships, drawing on existing educational resources, and reducing time to degree to the fullest extent possible to reduce the per-student costs of delivering instruction" (Western Governors Association, 1996b). In other words, it would cost western states less money to "deliver education" via the WGU. Implied, but not stated, is the notion that students will reap the benefits of this low-cost alternative,

making education less expensive from their perspective as well.

As the use of this term evolved however, the WGU began to portray itself as being cost-effective for students more so than for the states. The implied notion from the original definition took over as the primary way in which the WGU would save money. The idea was not that tuition would necessarily be lower, however. Rather costs would be reduced "because the student doesn't have to travel and move," according to a staff member. "In other words, the tuition cost may not be lower but all of the associated costs will be much lower" (Interviews). More important, however, was the notion that students could reduce their costs by taking competency assessments, thereby documenting skills learned outside of the formal education system. Explained one staff member,

> I think there is a very legitimate claim to be made that the WGU model is a cost savings over conventional education. And you can make that claim, because the student can come into a program, take advantage of life experience -- or general knowledge, knowledge they acquired from diverse courses wherever they might have it -- and by paying the fee for assessment: 50 bucks for assessment, versus paying 300 dollars in tuition costs for taking a course in the same area. (Interviews)

Rather than paying for the classroom experience, students could simply demonstrate their competency and move on. The WGU would allow students to tap into an educational system which is cost-effective for them.

The need for the WGU to be cost-effective from the states' perspective was not entirely lost. It just was not the focus of conversation. In general, the points made in the original 'cost-effective' definition were still supported. Sharing infrastructure, developing partnerships, and using existing resources were all seen as ways that the states could legitimately save money. Economies of scale, while much hoped for, were expected to be more of a long-term proposition. Reducing the time a student would take to earn a degree, on the other hand, was typically described as cost-effective from the

student's perspective, rather than highlighting the benefits that a state would receive in added capacity.

The implementation team, however, did end up rejecting one early argument for how the WGU would save money for the states. The potential of the new institution to handle the coming influx of students from Tidal Wave II without requiring the states to build more campuses was no longer endorsed (e.g., Blumenstyk, 1998). As a WGU staff member stated,

> I realize that early on there were governors who thought that this would somehow address that wave of high school graduates. First of all, I don't understand -- I am at a loss to understand why they designed an institution to serve nontraditional students, and then said it was going to serve recent high school graduates. (Interviews)

However, the notion of improving the capacity of higher education to handle more nontraditional students through distance education was still a major part of the agenda. While this was acknowledged to be a potentially money-saving proposition for the states, it was approached as an access issue rather than a financial issue. The same staff member continued his comment:

> On the other hand, there is demonstrably a huge second wave of learners. And it is coming about through needs for training employees, retraining teachers, getting people ready for second and third careers. That's the true -- to me -- that's the true wave of learners that WGU is in fact addressing, not the 18 year olds. ... It saves the state money because they're not building campuses to accommodate these [second wave] learners whoever they are. (Interviews)

Instead of the goal of saving money, then, the implementation team emphasized the more educationally oriented goals of improving access and promoting competencies as the rationale for the new institution. By early 1997, access and competencies were being listed as the "two key premises" on which the WGU was founded (Western Governors University, 1997c). Written about the same time, a draft mission statement for

the institution stated that "the principle mission of the Western Governors University (WGU) is to expand access to postsecondary educational opportunities." One of its "core activities," the document continued, is to provide "a means for students to earn competency-based credentials." By way of comparison, advanced technology was not mentioned at all, and the phrase "cost-effective postsecondary education" was used, without elaboration, only in the document's description of the market it would be serving (Western Governors University, 1997b).

Access was framed in terms of giving underserved students expanded choices in their education. The WGU planners spoke about student choice being paramount, and not being locked into a traditional paradigm for education. "I am not as concerned about certain absolutes as I am more about preserving student choice," said one staff member. "What's good for the student needs to be considered from the students' perspective as much as from the instructor side of it" (Interviews). If more choices could be provided through distance and competency-based education to those students who needed it, the WGU would be serving an educational need that had been neglected by traditional institutions. In practice the WGU could provide rural access for remote areas of the west, convenient access for those restricted by family or work obligations, and off-campus access for students who could not get into the last section of a course needed to graduate (Interviews). It could also provide access for the "second wave" learners who need to upgrade their skills or have other short-term educational needs not met by traditional college or university programs.

For access to be meaningful, however, it must be of high quality. The highlighting of competency-based education allowed the organizers to concentrate on this aspect of

their educational mission. The WGU was working from a deficit when it came to presumptions of quality. The political origins of the initiative, as well as the cost-savings rationale, raised questions regarding the institution's commitment to quality in general. And many academics were suspicious of the ability of distance education to meet the standards established by traditional means. As a critic commented, campus-based education is the baseline to which other educational options must be compared.

> If you are educating on-campus, the likelihood of student-peer interaction is much greater. And we know from all the educational literature that that matters. The likelihood of access to, and assignments in, a library is much greater. And we all know that that matters. The likelihood that faculty will have and keep office hours, and that students will interact with them there is much greater. And we know that that matters. So there are a host of differences, none of which is decisive. That is, these are process things, and they don't guarantee a good outcome, but if I've got one education system that is doing them all, and another one that is not, it seems to me then there is more to prove about the one that is not. (Interviews)

Dennis Jones (1995) provided the WGU's answer to this challenge in his paper from the Las Vegas meeting. He argued that because educational quality was traditionally defined through the process of campus-based instruction, non-traditional learning would always be suspect. But if the WGU shifted the discussion away from process and toward outcomes, then quality could become a measure of actual student learning. By taking the position that competencies could provide a valid way of assessing what the student knows, the WGU was making a strong claim for quality in a non-traditional environment. Competencies would provide demonstrable evidence of the strength of the new system. Agreeing with this, a WGU staff member stated that the institution stood for

> the highest quality of education and training. We are not about anything that would in any way compromise the quality of what our students are being exposed to. ...We want the brand of WGU in the future to be something that is acknowledged as a quality educational and training institution. (Interviews)

The emphasis on quality highlights the overall theme of these changes, as well as the shift away from the earlier high-tech focus. As the institution developed, the WGU staff and consultants increasingly promoted the education-related goals of the institution, emphasizing that it was a real university, with high standards and an educational mission. The technology was a distraction, so it was de-emphasized as a separate goal and integrated into the access dimension. Saving money implied lower quality, so it was reframed to primarily reflect the adaptability of the competencies to unique learning situations. Through this process, access and competencies emerged as the twin pillars of the WGU.

From Changing to Complementing Higher Education

The remaining original goal for the WGU was for it to change higher education. The adjustments made to this goal, however, reflected neither the quality emphasis nor a refinement of educational goals. Rather this goal was modified more out of an interest in making colleges and universities partners in the enterprise, instead of continuing the attacking rhetoric that actually established the WGU. Governor Nelson insisted on this partnership as part of the implementation plan. And WICHE's Cooperative was itself an organization made up of institutions in a partnership, with Sally Johnstone, the Cooperative's director, a member of the design team and a major contributor to the planning process. The polemics against traditional institutions would have to stop and a more moderate rhetoric would have to take its place if the WGU was going to be taken seriously in this partnership agenda.

That was exactly what happened. Two speeches by Governor Romer (1996;

1997), presented eight months apart, gave a sense of the difference. In the first speech, for a meeting of the National Association of State Universities and Land Grant Colleges (NASULGC), Romer stated that "higher education has not kept pace" with the changing demands of a skeptical public. He continued with a bulleted list of "reasonable" concerns that he and the public shared. Some examples:

- ... Classes that cram hundreds of students into a lecture hall [and] academic calendars that seem to offer as much vacation time as class time...
- Professors that entrench themselves behind the walls of the institution and lose touch with the evolving world outside the campus...
- Tuition rates that don't correlate with inflation or demonstrable improvements in the educational product. And ... more and more students [having] difficulty finding a relevant and meaningful job after they finish school. (Romer, 1996)

The second speech, given at a meeting of the American Association of Collegiate Registrars and Admissions Officers (AACRAO) had a rather different bent. The bullet points were gone and in their place was this paragraph:

> We must push higher education to raise its sights -- we should always seek to raise the quality of our most important investments. We cannot rest on the laurels of a past reputation. While I know there is so much right about our higher education systems, there is always room for improvement and innovation. (Romer, 1997)

Further evidence of the change is contained in the conclusions of the two speeches. The later AACRAO speech, after describing the WGU, offered this summary:

> The Western Governors University is a big idea. It will give students greater choice and access in higher education. As a practical matter, this means we are going to offer a high quality education to many more people. I encourage all of you to think creatively about how this initiative fits with the work you are currently involved in at your institution. (Romer, 1997)

The 1996 NASULGC speech had the exact same conclusion, with one significant difference. Inserted immediately before the last sentence was the following: "The Western Governors University has the potential to dramatically alter the way education is delivered in Colorado and throughout the western region" (Romer, 1996). That was

standard boilerplate WGU rhetoric at its founding and for months afterwards. But eventually -- the AACRAO speech was in August 1997 -- even the governors changed their tone regarding what the eventual outcome of the WGU would be.

By necessity this adjustment involved some revisionist history. The WGU was specifically created because the governors believed that traditional institutions and organizations were incapable of reforming their activities in ways that were needed. Indeed, the WGU was intended to provide a catalyst to spur traditional colleges and universities to action out of concern for their survival (Western Governors Association, 1995b). But over the course of implementation, this motivation was glossed over and even denied as the WGU's reliance on existing colleges and universities became stronger. By mid-1997, the WGU was described as a "complement" to traditional institutions -- an alternative, not a threat (Interviews; Leavitt, 1997). Presentations by the WGU staff regularly insisted that the WGU should not be seen as a "replacement" to traditional higher education (e.g., Livingston, 1997a; Livingston, 1997b). Far from being promoted as a transformative force in higher education, the staff limited its involvement to the "margins" of higher education, and the governors repeatedly emphasized devotion to their state systems (Interviews). Governor Romer could readily acknowledge colleges and universities as being "our most important investments," and commend institutions for their work in the field of distance education (1997).

By the time the WGU webmaster had occasion in 1998 to draft a version of the institution's history for the web page, it had been sanitized still further. The University's home page stated that the governors were "reaffirming their commitment to their traditional colleges and universities" when they acted to create this new "cooperative

approach" toward higher education (Western Governors University, 1998g). While the statement has little to say for it historically, it does accurately reflect the perspective of those involved in the WGU since at least the middle of 1997.

No longer was the WGU intended to be a standard-setting model for universities everywhere. To the contrary, it was ultimately designed to be of service to existing colleges and universities, to help them be more competitive, and to assist them in expanding their reach beyond the local and regional, to the national and international. "We believe that WGU was really formed to work on behalf of institutions," said one staff member, stressing the point, "and we intend to continue to do that" (Interviews).

The WGU still was something different in higher education. That is not in dispute. But by the middle of 1997, it had positioned itself in a niche left by traditional institutions of higher education. These institutions might change and their students might make different choices because of the WGU's position. But the promoters of the WGU stopped insisting they do so. Essentially, the WGU went from demanding change to demanding acceptance. That was the difference.

The Adjusted Vision

The governors and the staff they selected made choices in the process of turning the original vision into a real institution of higher education. The WGU would use technology, not promote it. It would improve access and demonstrate the use of competencies, while leaving the promise of cost reduction for others to debate. It would offer an alternative model for the delivery of postsecondary education and invite existing colleges and universities to participate. The designers of the WGU became interested not

so much in changing higher education, but in changing what people understood a university to be. In the process, the governors adjusted their original vision in order to build one real version of a Next Generation Virtual University.

The adjustments were made for several reasons. NCHEMS and WICHE, hired to do most of the design work, played a major role in revamping the vision. The increasing participation of people from traditional higher education in the planning and development impacted the process as well. In addition, decisions, assumptions, and political realities involving the governors themselves made some modifications necessary and acceptable. Finally, some of the societal and educational contexts for the new university changed, lessening the impact of the governors' original agenda.

NCHEMS, WICHE and the Involvement of the Higher Education Community

The consultants from WICHE and NCHEMS built the WGU. From the earliest framing of the design criteria to the development of degree requirements and student services, these two organizations took the governors' vision and created a university. It is not surprising, then, that the consultants influenced the outcome.

As individuals with significant experience working within higher education, the consultants took responsibility for ensuring that the governors' plans were both realistic and attainable. The timeline for implementation was stretched out, for example, to accommodate the complexity of developing the new institution. Model degrees were identified to provide a foundation for the competency-based design, rather than to directly compete with existing institutions with equivalent academic programs. Accreditation was approached carefully, with frequent consultation with the executive directors of the regional associations. On-line assessment instruments were rejected in

favor of previously validated paper-and-pencil tests and portfolios. With each adjustment in the name of practicality, the consultants brought the institution a step closer to reality while simultaneously scaling back the scope of the original vision.

The fact that people from the traditional academic community got involved with the WGU was both a cause of further changes to the vision, and an effect of the changes that had already taken place. The staff at WICHE, for example, got involved because the governors essentially assigned them the task of supporting the WGA's development of the WGU idea. Once in, however, their goal was to show the value of their organization to the governors. Even though Romer later apologized for lashing out at WICHE during the Las Vegas meeting (Interviews), the point was still clear to the people at that organization. The governors, a major source of funding for WICHE, were not satisfied with its performance. The frustrating aspect of this was that, even as the governors were criticizing WICHE for not being responsive to their needs, the organization was in the second year of a federal grant to broker degree programs among institutions in five western states. It was running the Cooperative, a collaborative partnership of well over 100 colleges and universities practicing distance education. It had founded NCHEMS, an organization that for nearly thirty years had been helping colleges and universities improve their efficiency and effectiveness. The governors' request for assistance was seen as an opportunity to show WICHE's political patrons the innovative activities in which WICHE had been involved for decades.

To that end, WICHE brought NCHEMS into the project (though Romer probably would have tapped his friends at that organization anyway). From its federal grants, WICHE volunteered funds to support the development of the WGU. WICHE also

supported and encouraged Nelson's use of existing institutions of higher education. The pilot providers were mostly members of WICHE's Cooperative, and Michael Goldstein, the lawyer from Dow, Lohnes, and Albertson on the design team, had worked with the organization and was a familiar face to bring into the planning. During the first year after the implementation plan was approved in Omaha, in fact, nearly every person actively involved in planning the WGU had a direct connection to WICHE and its subsidiary, the Cooperative.

With individuals from academia participating, there was a growing interest on the part of the governors in making the emerging WGU even more palatable to traditional academic mores. In Omaha, Governor Leavitt posed what would become the key formulation of this new agenda.

> I can tell you from experience -- and I think those who have been on the design team can reaffirm -- that our greatest obstacle will not be the technology. Our greatest obstacle will be the sociology: Working through the people elements of this. (Western Governors Association, 1996g)

The governors believed, with the encouragement of NCHEMS and WICHE, that a successful institution had to have credibility within higher education. This was part of the design criteria which Dennis Jones included in the first vision statement. The institution would operate, he wrote, "in ways that are recognized and valued by both employers and institutions of higher education. The intent is to provide individuals with a new currency that makes their learning portable in the marketplaces of employment and academe" (Western Governors Association, 1996b). The "sociology" of this, in Leavitt's phrasing, involved selling the WGU idea to members of the academic community -- entering into a dialogue with them, encouraging their advice, and adopting their suggestions (Interviews).

Once involved, these people began to offer suggestions and advice about how to make the WGU work better. Their extensive experience in designing and delivering distance education programs was welcomed in the project. A good example of this was WICHE's work with the pilot institutions that served as the initial sources of instruction for WGU programs. Nearly all of the colleges and universities that participated were members of WICHE's Cooperative. Because of this prior relationship with the Cooperative, and because of their institutional experience with distance education, WICHE focused on developing a list of distance education courses rather than contracting for specific educational services. Instead of requiring, as originally conceived, the pilot institutions to respond to the competency framework through a request for proposal, WICHE created a system where any distance education course could be listed. In addition to using these courses as resources for its own degrees, the WGU would serve as a broker of educational content as well. Since this function was quite similar to the brokering model the Cooperative had already established, it resulted in a similar 'cooperative' relationship being established among the pilot institutions and the WGU. As they became more like a group of colleges and universities working together for their mutual benefit, the WGU took on the image of a collaborative venture rather than a maverick jousting for reform.

For their part, the consultants at NCHEMS did not adopt the cooperative model in their dealings with other colleges and universities. However, while they were clear that the WGU curriculum was not going to be based on consensus (Jones & Ewell, 1997), they did develop the competency statements for the first degrees in close collaboration with faculty from traditional institutions of higher education. And both WICHE and

NCHEMS consulted with higher education associations regarding specific policies and procedures relevant to their expertise. To that end, the National Association of Student Personnel Administrators was asked to help think through the issues of student services in an on-line environment. The Servicemembers Opportunity Colleges, a consortium of institutions which supports the education of military personnel, was consulted on issues relating to institutional transfer and credit for experience (Interviews). This served to further identify the WGU as an institution that was working in concert with the academic community. The governors, too, were increasingly convinced that success would come from the acceptance of the WGU by the higher education community, lending a greater authority to the contributions of those in higher education.

Others in higher education got involved not just from formally participating in the development of the WGU, but through informal conversations as well. This happened at the numerous presentations which the consultants, and later the WGU staff, made at universities and colleges around the country. National and regional meetings of various higher education associations also received their share of visits from the WGU organizers. At one point in early October 1996, a progress report noted that more than fifty presentations had been made since the beginning of the year (Western Governors University, 1996). One representative of a Washington-based association stated that there had been a presentation on the WGU at nearly every national meeting he had attended during 1997 (Interviews). Almost all of these presentations were designed to sell the WGU idea: calming the fears of those who were worried about the WGU's impact on their organization, answering their questions, and responding to their concerns. In this process, however, the message of radical reform was diluted and the new agenda of

partnership with higher education was promoted in its place.

The need to sell the WGU idea was originally part of the 'change higher education' agenda. Governor Romer had conceived of the WGU as a "charter university" which would work to reform the system by demonstrating a new model for others to emulate (Interviews). But charter universities, like charter schools, work for change within the system. In order to be successful their innovations have to be accepted by the system. There was a need, then, to actively promote the changes advocated by the WGU so that the innovations could be adopted. This was part of the original design, written into the work plan of the vision statement: "The design plan explicitly seeks to inform and engage interested parties in matters of substance at every step," it said. An effort would be made "to ensure adequate opportunity for comment from learners, educators, and the business community" (Western Governors Association, 1996b, p. 10).

Perhaps the lesson is never ask for comment from an academic. As noted above, there was criticism of the word 'virtual,' and the focus on saving money came under attack as well. In addition, institutions that were already involved in distance learning were offended their efforts had been ignored, and those that were focused on campus-based learning were quick to note the socializing aspect of education. Student affairs administrators pointed out the difficulty in providing personal attention to students in a distance learning environment, librarians suggested that on-line resources would not prove adequate, and liberal arts faculty suggested that developing a competency-based Bachelor's degree would not prove practical (Interviews). The WGU planners accepted all of these comments and, in doing so, made it clear that they were willing to make reasonable adjustments to the original vision to accommodate the concerns of those in

academia. “We have always attempted to take advantage of expertise and experience wherever it lies,” said one WGU staff member. “We do not want to rediscover the wheel every time we try something” (Interviews).

The problem was that they were creating something that was unique. As the planners were quick to point out in other contexts, the WGU was a new kind of institution, qualitatively different from any other college or university. Said one WGU staffer:

> We are building something that there really isn’t a model for. You can’t really say well, okay, here is a model for all the things we need, so what do we have and what don’t we have. There isn’t something like this that we can look to as a guide post. (Interviews)

But in designing the WGU, they did look to other institutions of higher education, and were guided by what they found there. Sometimes, perhaps even often, the suggestions of academics were rejected as being antithetical to the vision. Accordingly, assessment of competencies was a “non-negotiable” dimension of the WGU (Interviews). The new institution would not hire its own core of traditional faculty. The commitment to access through distance learning was secure. But the other aspects of the governors’ original vision -- those that were not directly related to the educational mission of creating a real university -- were truncated, and left for others to consider as possible byproducts of the WGU. Thus, whether the WGU would make education less expensive, create a technological mandate, or force dramatic change in existing colleges and universities, was not the concern of the planners. When traditional academics expressed their disapproval or concern with these implications of the governors’ vision, their fellow academics involved in the design were sympathetic. Adjustments, when not already anticipated, were easily made without sacrificing the truly radical mission of creating a

competency-based virtual university. Sometimes subtle, sometimes substantial, these shifts moved the WGU away from its confrontational and renegade beginnings toward a version that would be more acceptable to those whose opinions the organizers were soliciting.

The Governors

The governors for their part accepted the adjustments offered by the consultants with little nostalgia for the original vision. In fact, they contributed to many of the changes. Several decisions made by the governors affected the final design of the WGU, moving it away from what was originally envisioned. Governor Nelson's insistence that the academic content for the new institution be provided by faculty at existing colleges and universities was a prominent example of this. While a legitimate recognition of the investments being made in distance education, Nelson's perspective did have the effect of making traditional postsecondary institutions a primary focus of the WGU design. As a consequence, non-traditional providers of learning materials and experiences, such as book publishers and corporate universities, received far less attention from the WGU than anticipated by the original vision.

Governor Romer's emphasis on competency-based degrees, and the governors' subsequent push for accreditation, also had significant consequences for the WGU design. If the WGU had not been designed to award degrees, accreditation would not apply to the institution, and there would be no reason to submit to an evaluation by traditional academics sitting as accreditors. But the governors made a commitment to be a degree-granting institution -- specifically a competency-degree granting institution -- rather than simply a clearinghouse for programs offered at other colleges and

universities. This “seminal decision” as one member of the design team called it (Interviews), made the WGU a real university, at least in the sense that it was awarding the traditional academic credential for completion of its program of study. Seeking regional accreditation was the next step. The governors specifically wanted to force the accreditation community to change their standards and recognize the new definitions of quality represented by a competency-based degree. This was part of the process, as they saw it, of changing higher education.

Once the governors started down this path, however, the draw of actually gaining accreditation became irresistible. The status associated with becoming a regionally-accredited institution of higher education was a plum for the WGU, and represented a level of official approval that, at the time, no other virtual university had. Because of this, the demands of accreditation began to drive the design process (Interviews). As the governors engaged in a conversation about quality with the accreditors, the WGU implicitly accepted the ground rules of the accreditation process. Standards would be set and the WGU would have to meet them. If the governors wanted to have their institution accredited, they could not themselves remain impervious to adjustments required in the process.

Because of the accreditation process the WGU began to be described by its designers in more traditional terms. The accreditors, for example, required a philosophy of general education to be stated for the degree programs. The WGU complied and composed a traditionally-worded commitment to “make people better citizens and give them wider perspectives on their world” (Interviews; Western Governors University, 1998a). Accreditation also affected the centrality of the political leadership under which

the institution was founded. The original governor-dominated Board of Trustees was reconstituted, making the politicians a minority, to satisfy the concerns of the accreditors. Accreditors also questioned the lack of faculty participation in the curriculum. The WGU staff made sure that every responsibility of the traditional faculty member -- with the significant exception of instruction -- was explicitly identified and assigned to staff with appropriate academic credentials. While these were not generally seen as major concessions on the part of the governors, they were representative of the two-way street that accreditation became for the WGU. In making the decision to offer degrees and seek accreditation, the governors accepted, albeit unintentionally, the conservative forces of higher education. Accreditation was intended to demonstrate that the WGU was a respectable institution of higher education (Interviews). And respect in academe strays only so far from the traditional.

Besides involving existing colleges and universities as content providers and inviting the influence of traditional higher education through the accreditation process, the governors also appointed two academics to serve as the initial co-directors of the WGU: Jeffrey Livingston and Robert Albrecht. Both were properly credentialed faculty members -- Albrecht earned his Ph.D. from the University of Minnesota in American Studies, while Livingston held a doctorate in business administration from Arizona State University -- and each had taught at a number of campuses. Livingston was Governor Leavitt's appointee to the design team and had been involved in planning the WGU from the beginning. Albrecht, too, had participated in the planning for the WGU through his position as chair of the Cooperative's steering committee. They each came to the WGU from senior administrative posts in higher education -- Livingston from his post in charge

of technology for the Utah System of Higher Education and Albrecht from a similar position at the University of Colorado. They were chosen by the lead governors, Leavitt and Romer, to head the WGU because of this experience with technology and higher education, each governor selecting the senior academic in his state with responsibilities in distance education.

The appointment of Livingston and Albrecht formalized the movement of the WGU project away from the policy orientation of the governors and WGA staff, and toward individuals steeped in the academic culture, aware of its mores, and appreciative of its values. The governors could have appointed people who were skilled executives from the telecommunications industry or expert policy analysts from government. But they chose academics, further signaling their interest in creating a university that would operate inside accepted boundaries for an institution of higher education. While this was not the mandate given to the new co-directors, hiring Livingston and Albrecht did give the consultants at WICHE and NCHEMS like-minded people with whom to collaborate on strategic direction. Indicating this, a press release from WICHE announcing their appointment called them “long-standing friends” of the organization (Western Interstate Commission for Higher Education, 1996).

Their appointment also had the effect of resolving a simmering tension that existed while the project was part of the WGA. Singer and the staff at the WGA approached the virtual university as they did any other project assigned to them by the governors. Their role was to fulfill their charge as effectively as they could. Tasks would be assigned to consultants as the WGA staff saw fit, and all work products would be reviewed by the staff before reaching the governors. That is not what happened in this

case, however. The consultants came into the project independently of the WGA, developed their own agenda, and worked directly with the governors in implementation (Interviews). The role of the WGA in fleshing out the vision of the governors was circumscribed as the consultants from WICHE and NCHEMS took over. Where the WGA was looking at the project in terms of a corporate start-up -- Singer's Ph.D. was in entrepreneurial finance -- WICHE and NCHEMS approached it from the perspective of developing a plan that would be successful given the skeptical reaction of the higher education community (Interviews). The selection of Livingston and Albrecht as the co-directors solidified the lead role of the consultants in the project, and made academic success the focus of development.

There was a practical aspect to the governors' actions here as well. Because of Governor Nelson, existing colleges and universities were playing a central role in delivering the academic content of the WGU. And because of the focus on awarding fully accredited degrees, the higher education community was ultimately going to evaluate the quality of the academic experience through the accreditation process. It made sense to focus on the connections to academia -- as opposed to linking more closely to workforce development and industry credentialing -- and to hire staff who would be credible to others working in higher education. The business community was already supportive of the governors' actions and had been contributing significant time and money to help the WGU get started. Buy-in from the higher education community, on the other hand, was what the governors decided they needed for their innovation to ultimately succeed (Interviews).

The final decision that the governors made which affected the development of the

WGU was to leave partisan politics out of the WGU. As Governor Leavitt stated in a 1998 speech, "If this becomes a political process, it will fail" (1998). With the majority of the early planning occurring during the 1996 presidential election year, and with the four major governors involved in the WGU active in campaigns, it would have been easy for the institution to become politicized. Leavitt and Geringer were making their successful bids for re-election as Republican governors. Nelson was attempting to fill a vacant U.S. Senate seat from Nebraska as a Democrat. And Romer was the Chairman of the Democratic National Committee during President Clinton's re-election campaign. Still, partisan agendas from the campaigns did not enter into the development of the WGU. It was a conscious decision on the part of the leaders of the effort, Leavitt and Romer, to rise above politics. And they played that card consistently in portraying their collaboration: If these two governors who probably agree on little can agree on this, then it must be a good idea (Interviews).

Politics were not irrelevant to the planning, however. The choice of Livingston and Albrecht as co-directors, for example, reflected the inability of the governors to pick just one person to be the CEO of the organization. Selecting a single individual would amount to choosing one governor over the other. So, maintaining parity, Leavitt named Livingston and Romer named Albrecht. A similar situation emerged when the governors were locating the WGU's corporate headquarters. The institution was incorporated in Utah, while the academic functions stayed in Colorado. This dual accountability was "just the nature of the organization," according to one consultant. "Everything was done in pairs" (Interviews).

This may have been political, but it was not partisan. Dividing the WGU between

Colorado and Utah did not happen because the governors were Republicans or Democrats. Rather its origin was in the way the WGA, as the founding body of the WGU, was organized. Every project was led by a Democrat and a Republican, and when the WGU started, it was no different. This principle continued to hold sway even after the institution was separately incorporated as an independent entity. Another reason was the personal investment of time and energy the governors, particularly Romer and Leavitt, made to the WGU initiative. A WGA staff member commented in early 1998 about the continuing contributions of the governors:

> They still talk, they still have conference calls regularly. Their personal, I think, devotion of time as well as keeping it going -- It wasn't just, 'This is a good idea and let's do it,' and then their interest died off [while] staff handled it. They have been very hands on. (Interviews)

A consultant further stated that he had "never ceased being impressed with the stick-to-it-ive-ness of Romer and Leavitt" (Interviews). They remained committed to the outcome of the WGU and through their designates, the governors maintained a direct connection with its planning.

The fact that partisan politics did not enter into the decision making meant that the WGU could be about education, rather than political posturing. The governors were committed to this idea, not because it would get them re-elected, but because they believed the WGU was the best solution for what they saw as a problem with the system of higher education. With that focus, and with the consultants at NCHEMS and WICHE actively pushing the educational agenda, the governors could present a unified front for their solution. As the definition of their solution changed -- as the original vision was adjusted during design -- the governors remained committed to each other and to the process they had established.

This is not to say, however, that there were no frustrations at all with the decisions made on behalf of the WGU. For example, the change to the Board of Trustees disenfranchised all but four governors from the direct governance of the WGU (though all were still ex officio members of the WGU Corporation). And some governors felt that too much effort was being placed on the competency-based degrees to the neglect of making distance education available to rural populations (Interviews). But these disagreements were addressed at Board and corporate meetings in debates over the educational agenda for the institution with no apparent reference to the external world of politics. The goal was not to score political points, but rather to make decisions in the best interest of the WGU. As leaders of the new institution, the governors seemed eager to adopt the university perspective. "Governors are treating this as their institution," said one consultant. "[They are] like kids in a candy store" (Interviews). And each governor was happy to be there.

The Context

A final explanation of the adjustments to the original vision was the fact that 1995 was not 1997. The context for the governors' decision had changed between when the WGU was first conceived, and when the idea assumed its final shape. On a political level, the differences were dramatic. In 1995, Republicans had just taken over Congress and had declared the beginning of an ideological revolution. In 1997, President Clinton began his second term in office, having successfully bested the Republicans on their agenda and marginalized their calls for radical reform. Economically, too, the changes were equally significant. Tight finances and mid-year budget cuts were a common story in state capitals around the country during 1995, and half the western states had

registered declining levels of support for higher education over the previous two years. By 1997, the economic recovery was in full bloom, state coffers had filled, and higher education was enjoying its first real funding increases of the decade (Chronicle of Higher Education, 1995; Chronicle of Higher Education, 1998a).

Technology had changed too. 1995 was marked by the just emerging public awareness of computer technology and telecommunication applications. The latest computers came with 14.4 modems and the newest Pentium processors were running at 90 megahertz. Netscape had just begun producing web browsers. Amazon.com did not exist. By the end of 1997, however, modems were four times faster and new processors had tripled their power. Computers were in over a third of American homes. Netscape and Microsoft were competing to provide browsers for tens of millions of people surfing the web. And, after going public in mid-1997, Amazon.com was the darling of Wall Street, worth half a billion dollars. The internet, still relatively exotic when the WGU was first proposed, two years later had taken huge strides toward becoming a mass medium for communication.

Just proposing an on-line university was a radical gesture when the technology was new and few people had ever been on the internet. Arguing for the cost-savings of a technologically-based institution was important when new funding looked scarce. And politicians proposing to shake up an entrenched bureaucracy had great currency in an era when the electorate was rejecting the status quo. But that was just a moment in time, and once the context changed the rationale for the WGU changed with it. No longer a virtual university with cutting edge technology, the WGU was recognizing the leadership role played by colleges and universities in distance education. Flush with money, states were

boosting their contributions to existing campuses, and declaring that the WGU would not reduce future funding levels. Recognizing that there was no longer the same general appetite for change, the politicians re-assured academics that they had no intention of replacing traditional higher education. Since there were no longer quite the same forces compelling the governors to act, the vision could be adjusted without much explanation. All it took was a few shifts in word choice, the reframing of a couple of outdated ideas, and the reinterpretation of original intent.

Envisioning the WGU

The WGU as it was ultimately envisioned, while not the same as the governors' original plan, was still true to the essential outline of the idea conceived in Park City. It was a competency-based institution that tapped into the distance education resources available around the West. And it looked like no university anyone had ever seen. A member of the WGU staff, in fact, stated that he was

> ...impressed with how much the original vision, as expressed by two Governors, and bringing that together -- how that vision has remained unchanged in the carrying out and the acceptance of WGU. I have said to myself, my gosh, these guys were right on! -- without having the benefit of two years of implementation experience to find out how right on they were. That has been a real revelation to me. How did they do that? (Interviews)

Maybe, as a WGA staffer suggested, the governors "bent over too far backwards to the current higher ed. community" (Interviews). From the original antagonism toward traditional colleges and universities, to the early condemnation of the accreditation process, the governors did moderate their positions considerably. On the substantive issues of creating an alternative evaluation and delivery mechanism for postsecondary education, however, the governors held firm. Romer's "fundamental revolution"

(Western Governors Association, 1995b) had survived the process. In the end, they had their design for a Next Generation university.

What is interesting is that the WGU survived as a radical institution with such close connections to academia. Recall, however, that those academics most directly involved were not at all opposed to what the governors had proposed. Devoted to distance learning and committed to competency assessment, the staffs at WICHE and NCHEMS were among the most knowledgeable people in the country on these topics. The campus representatives of the pilot institutions were generally enthusiastic about the potential of the WGU, and were eager to see it begin. Even the accreditors were interested in what the governors were attempting and wanted to see them succeed (Interviews). Yet the WGU had corporate partners, too, equally invested personally -- and more invested financially -- in the success of the WGU. They, however, did not have nearly the influence over the development of the institution as did those in higher education. The governors accepted a design created by academics, not by executives.

The WGU model for postsecondary education that these academics proposed was unquestionably innovative, and it challenged the traditional definition of a university. In order to complete the design, however, two issues remained. First, the founders had to create the institution they had envisioned. The WGU existed only on paper until approximately the beginning of 1998. It was a virtual university in the literal sense of the term, and a real university would have to take its place. The second issue involved making the case, through the process of accreditation, that the WGU counted as a real institution of higher education. Basic standards of the wider academic community would need to be met before the WGU could actually be considered a university. Until these

two issues were tackled, the governors' vision would remain unfulfilled.

CHAPTER IV

ACCREDITATION

The WGU was little more than a set of grandiose plans and an attractive logo when the governors, consultants, and nascent staff began discussions with the regional accrediting associations. Concrete decisions regarding what the WGU would actually do were only beginning to be made. Many of the adjustments to the original vision described in the previous chapter had not yet taken hold, waiting, in part, to be influenced by the accreditation process. Still, formally engaging the accreditors initiated a new stage in the development of the WGU. The rhetoric begun in Park City was going to be transformed into a real university.

InterRegional Accreditation Committee

The accreditation process for the WGU began on September 30, 1996, with a meeting hosted by Governor Romer in Denver. Attending were the executive directors of three regional accrediting commissions which had jurisdiction over the WGU member states: Patsy Thrash of the North Central Association of Colleges and Schools (NCA); Ralph Wolff of the Western Association of Schools and Colleges, Senior Colleges and Universities (WASC-Senior); and Sandra Elman of the Northwest Association of Schools and Colleges (Northwest). Governor Leavitt was at the meeting as well, with WGU co-directors Robert Albrecht and Jeff Livingston, and consultants Peter Ewell of NCHEMS and Michael Goldstein of Dow, Lohnes, and Albertson. This group had come together to

have a frank discussion regarding the WGU's accreditation potential.

By all accounts, it was quite a productive meeting (Interviews). An extensive conversation regarding standards, educational innovation, and the role of regional accreditation boiled down to a single question: Would the regionals consider working together with the WGU to develop an accreditation process that made sense for such a unique institution? The Executive Directors agreed, but only after warning the governors that the WGU would be subjected to the same level of scrutiny as any other new institution of higher education. There would be no special treatment, and the process would not be truncated to meet the one-year deadline established in the Implementation Plan.

With that understanding, the governors and the Executive Directors began to outline the parameters of the process. It would involve all the regional accrediting bodies which had responsibility for WGU member states, including the community and junior college division of WASC (WASC-Junior) led by David Wolf. These four associations would ask the WGU to meet a single set of criteria which would be consistent with the "spirit of the standards" for accreditation that existing colleges and universities had to meet (Livingston & Albrecht, 1996). The executive directors agreed that the review process could avoid separate applications to each association, and that existing colleges and universities would be able to provide courses and programs through the WGU without having their own accreditation status questioned (Livingston & Albrecht, 1996). This was a small patch of common ground from which to work, but it was enough to start the process moving.

The executive directors were motivated to respond to the governors' request for

several reasons. On one level, as a consultant described it,

> It was purely a political reality. Not that they would roll over and played dead, but they certainly were going to make a very good faith effort to figure out a way not to appear to be thumbing their noses [at the governors]. If they were going to have to say no, they were damn well going to have an awfully good reason to say no. (Interviews)

Apart from the politics, however, there was also the reality of the WGU to deal with. This was an institution that would be national in scope, and regional accreditation had no model in place to adequately evaluate such schools. As an executive director explained,

> I was concerned that we wouldn't recreate a problem that we had had before, mistakes made in the '70s and '80s with institutions that don't fit into the regional structure for accreditation. The University of Phoenix for example, is accredited by North Central but it operates all over different regions. This has been an issue between North Central and WASC, and with the Southern region and the Northwest region. What ends up happening is that two institutions can operate next door to each other yet have to follow two different accreditation guidelines. I didn't think this was a good idea.

The real issue here was the perception that the NCA, in the words of another executive director, was "always considered to be the loosest goose in the world and would accredit anything that walked down the pike" (Interviews). The accreditors were worried that the WGU was going to "accredit shop" -- meaning the governors would compare the policies of the different regions and choose to submit their application to the one that would present the fewest roadblocks to accreditation (Interviews). This was, in fact, being considered by the consultants, if not the governors. As late as November 1996, the argument was made that the WGU should incorporate "in a state whose institutions are under the jurisdiction of the most hospitable of the accrediting bodies....The accrediting agency of choice for this purpose is clearly North Central" (Goldstein, 1996). If accreditation came only from one regional, especially if it were the NCA, the fear was that a low-quality institution would be set loose across the United States with little the

other regionals could do to stop it. Only by working together from the beginning could the regionals hope to have some measure of control over an institution that would geographically impact each of them.

The executive directors wanted to speak with one voice about the WGU. If it was going to be accredited, they wanted each association on board so that there would be no question about the appropriateness of the decision -- regardless of whether ultimately they decided for or against accreditation. But in the short term, this was complicated by the leadership transitions that each regional was undergoing during 1996. By the time of the Denver meeting in September, three of the four executive directors were new. The newest, Sandra Elman, had been on the job less than a month. And Patsy Thrash of NCA, the only executive director with more than a few months of tenure, was due to step down in December. Real progress on a common plan of action had to wait until Steve Crow made his transition into the NCA executive director position after Thrash left.

On the other hand, the leadership changes made the cooperative effort easier. Since each executive director was new, appointed after the WGU was a known entity in western higher education, they all were aware that they would be expected to deal with these accreditation issues as a condition of employment. They also did not have the baggage of old rivalries and tensions between the regionals as part of their personal histories (Interviews). In fact, before taking their positions, all of the new executive directors had worked together on a separate effort to develop common eligibility requirements and accreditation standards which would reflect existing cross-regional similarities (Regional Accreditation Committee, 1996). While new to their respective leadership roles, they had already developed strong working relationships with each other

through this recent effort, and -- conveniently -- had documented a set of requirements that cut across regions. This level of inter-regional trust, not to mention a pre-existing list of standards with support from the top, would not have been present had the old leadership happened to continue (Interviews).

With the trust and standards in place, it was a short step to the creation of a joint accreditation body: the InterRegional Accreditation Committee (IRAC). Between December 1996 (when Crow stepped into the NCA Executive Director position) and March 1997 the details of this unprecedented collaborative effort were worked out among the western regionals. IRAC was developed not as a special arrangement for the WGU, but as a pilot for a process that could be adapted to other institutions with similar characteristics (Interviews). It would have sixteen members, three from each of the four founding regions, plus the executive directors. Beginning with a statement of twenty common eligibility requirements which the regions had developed earlier, IRAC would formally develop a set of standards that would make sense for a national, competency-based institution like the WGU. The process to full accreditation, however, would take a while. The initial time line was for an eligibility decision to be made no earlier than the end of 1997, with a four to six year process to full accreditation (Interviews; Livingston, 1997c).

With the forming of IRAC, the accreditation process for the WGU was established independently by the regionals with limited involvement from the governors or WGU staff. If this new institution was going to be accredited, it would have to follow the rules set forth by these regional associations. And under IRAC, it would be treated no differently than any other college or university accredited in the normal way by a single

association. The accreditors were willing to work with the WGU and help it become an eligible institution. But in the end, the decisions were going to be made by IRAC -- a committee of academics concerned with issues of quality, substance, and institutional integrity. The WGU would have to meet their standards.

Eligibility Requirements

All involved in developing the WGU were enthusiastic about the structure the executive directors proposed. In a letter to WASC-Junior Executive Director David Wolf, Jeff Livingston summarized the WGU response to the formation of IRAC: "We were certainly pleased with the outcome of the meeting and we acknowledge the contribution that you and others made to the results of the day" (Livingston, 1997c). The governors, too, accepted the delay inherent in the process without much hesitancy, and an enormous amount of effort was put into gaining eligibility. Even though eligibility held no formal status, it did represent the status that the WGU was looking for. It indicated that the institution was "part of the universe of institutions that regional accreditation certifies" (Interviews). Eligibility meant that the WGU was playing in the same ball park as traditional colleges and universities, that it counted as a traditional institution of higher education. The process that IRAC would supervise legitimized the WGU model, and eligibility was the reward.

While there was very little consultation with the governors and WGU staff regarding the design of IRAC and the procedures it would follow in making the eligibility decision, there were extensive discussions regarding the actual requirements the WGU would be asked to meet. Formally, the WGU submitted two drafts of its

responses to the cross-regional eligibility requirements developed earlier, receiving written feedback from the accreditors each time. Informally, conversations and email flowed frequently as the WGU staff continued to seek clarification, and IRAC sought understanding. This was a new process for both parties and the back-and-forth communication served as an education for each. While IRAC and the WGU did not negotiate the wording of the requirements -- IRAC stipulated the phrasing of the final set of 20, listed in Table 3 in Appendix B -- the accreditors did make two changes to the original list to accommodate the unique structure and mission of the WGU.

The first change was made to the requirement which called for the institution to award "academic credits or [use] units based on credit hour equivalency" (Regional Accreditation Committee, 1996). The WGU was clearly not going to meet that stipulation, nor would any other competency-based institution. The executive directors noted, however, in an early explanation of the requirements that

> This [eligibility requirement] provides us with a guiding principle with respect to how an institution will articulate transferable degrees with other institutions. The concern here is that we need to give notice to students when their learning activities are not designed to be transferable. (Crow, Elman, Wolf, & Wolff, 1997)

Based on this principle, then, IRAC rewrote the requirement under the heading of "Portability of Learning," and directed the WGU to be up front with students about how easily their competency-based programs would transfer into other, more traditional, institutions (Inter-Regional Accreditation Committee, 1998a). Credit hours were taken off the table and IRAC agreed that the WGU could quantify learning via alternative means.

The second change was made to the eligibility requirement regarding faculty. While foregoing credits was relatively straightforward for IRAC, the committee had a

more difficult time with the WGU's lack of traditional faculty. The original requirement read "The institution has a core of qualified faculty with primary responsibility to the institution and sufficient in size to support all of the institution's educational programs" (Regional Accreditation Committee, 1996). The WGU had no faculty, and IRAC was particularly concerned about this fact. Without a faculty, how could it be considered an educational institution? At first, WGU was specifically asked for a list of names and qualifications to judge this requirement (Crow et al., 1997). But in a draft response, the WGU described a model where "faculty functions are discharged by distinct types of individuals" who would collectively ensure the integrity of the academic program and actively advise enrolled students. Acknowledging this structure, IRAC settled on new wording that asked for "a clear statement of faculty responsibilities including development and review of the curriculum as well as the assessment of learning" (Inter-Regional Accreditation Committee, 1997). The committee's interest, however, was still on student-"faculty" ratios, an explanation of the involvement of the "faculty" with the subject matter, and the academic qualifications of those the WGU had hired (Inter-Regional Accreditation Committee, 1997). The text of this requirement had changed to recognize the WGU's academic model, but the conceptualization behind it had remained essentially traditional. Despite the new language, the only real difference, at least initially, was that the word 'faculty' was written in quotes in IRAC's comments.

A few other items were changed for clarity, and an additional requirement was added regarding planning for full accreditation status (see Table 3 in Appendix B). But other than eliminating the credit mandate and changing the wording of the faculty item, IRAC maintained the same rather traditional criteria to which the regions had agreed

before the WGU even existed. The requirements were essentially no different from what any one of the regions would require of its own colleges and universities, and the WGU's response was assessed as much as possible from this perspective (Interviews).

Eligibility Decision

Peter Ewell, in a memo to WGU executives Albrecht and Livingston, stated, "I continue to be a little surprised at how much IRAC seems to be requiring of WGU for 'eligibility,' compared to other institutions I have worked with in this process!" (Ewell, 1997a). It was not the formal eligibility requirements themselves, however, that were so difficult to address from Ewell's perspective. Rather, it was the fact that IRAC was asking for answers to major questions which cut across the stated requirements. These questions went to the heart of the WGU's academic and organizational structure, and reflected the struggle the accreditors had with applying deliberately traditional criteria to a non-traditional institution. As one executive director commented after reviewing an early draft of the WGU's application for eligibility, "The place is so new and so different that it almost tires me to try to assimilate everything in the submission" (Crow, 1997).

NCHEMS identified seven "cross-cutting concerns about the concept of the WGU, its current status, and how it intends to operate" that were suggested by IRAC's initial response to WGU's eligibility submission (National Center for Higher Education Management Systems, 1997d). A December 1997 meeting of IRAC, originally scheduled to be when the decision on eligibility was going to be made, was instead devoted to a presentation by the WGU directly addressing these concerns (Interviews):

1. How is WGU governed and, more particularly, how can it demonstrate that it is an established, independent, entity with a mission appropriate to an academic

institution?

2. Does WGU have an organizational structure that ensures its effective operation and has it assembled sufficient administrative capacity to effectively discharge its planned functions?
3. Who are WGU's faculty and how do they exercise adequate academic direction for the institution as a whole, as well as control of its curriculum?
4. How does WGU provide general education as an integral part of its degree programs and what are the goals of general education?
5. What provisions are made for students who desire to transfer into WGU's academic programs from other institutions?
6. What specific mechanisms does WGU have to evaluate its ongoing operations and plan for its future?
7. Given that many of WGU's administrative and instructional functions are outsourced to third parties, how does the institution exercise adequate control and oversight of these functions? (National Center for Higher Education Management Systems, 1997d)

The presentation by the WGU staff alternated between reiterating or clarifying information contained in their draft responses to the eligibility requirements, and explaining some of the changes to the WGU they had made in response to IRAC's concerns. But the overall goal of the presentation was to get the accreditors comfortable with the unique structure of the WGU. The staff wanted to convince IRAC as a whole that the institution was pushing the boundaries of higher education, not going outside of them. If the vote would have been taken before the presentation, it was unlikely that the WGU would have been declared eligible (Interviews). The Committee members just could not see an institution of higher education in the governors' plans. After the meeting, however, Ewell reflected that "for the first time [there was] a real understanding on IRAC's part of what WGU is all about. This represents significant progress" (Ewell, 1997b). Since the presentation on these seven questions was so critical to the eventual eligibility decision a few months later, some attention to the WGU's answers is necessary.

Question 1: Appropriate governance and academic mission

This question represented the reservations IRAC had regarding the governors' leadership of the WGU. Originally the Board of Trustees was made up of the governor and his designee from each state participating in the institution. The executive directors commented early on that "WGU would have to demonstrate that the Board understands and operates WGU as an educational rather than political entity" (Crow et al., 1997). Later, the full Committee questioned "the viability of the current governance structure. It is not clear that there is a board that knows and, with all due respect, is substantively engaged in what is going on" (Inter-Regional Accreditation Committee, 1997). Through the summer of 1997, for example, IRAC noted there had never been a Board meeting with quorum, nor had most Board members devoted any significant time to WGU governance issues.

The WGU staff and consultants had already identified some of the problems with having a board made up primarily of governors. As one consultant put is, simply scheduling meetings was "like herding cats" (Interviews). When decisions needed to be made, it was difficult to get access to busy politicians. And the politics of working directly with sixteen (at the time) governors provided an extra level of complexity to an already complex institution (Interviews). IRAC's concerns provided the external motivation to form a new governance structure which would solve these problems, while at the same time addressing the broader concerns of the accreditors. In the Fall of 1997, the original Board was dissolved, and the governors, as members of the WGU Corporation, voted in a new, smaller group to serve as Trustees. The new Board's structure

> had been scaled down in order to make it small enough to allow its members to be as active as possible while maintaining representatives of the key constituents who are critical to WGU's long-term viability, namely state governments, business, and higher education. (Western Governors University, 1997e)

The Board of Trustees now had just four governors, plus five members from industry, two foundation representatives, and three individuals from academia (Leavitt & Romer, 1997). This new structure, with more limited gubernatorial membership, was more to the liking of IRAC.

On the issue of educational mission, the staff noted that the WGU had recently received 501(c)(3) status from the IRS as an independent, non-profit, educational institution. The institution was discussing becoming an Experimental Site under the auspices of the federal Department of Education, and gaining approval through that status to award financial aid to its students. And it was working with members states to receive the authority to operate as a postsecondary institution within their borders. In response to IRAC's concerns, the WGU staff was able to demonstrate not only that the institution now had a Board which looked very similar to any other college or university Board, but it also had a tax and legal status identical to nearly every other accredited institution. Plus, the Department of Education was considering the WGU as a potential participant in a program specifically and exclusively authorized for postsecondary institutions under the Higher Education Act. The preponderance of the evidence suggested that an institution of higher education had been created that could be recognized by the accreditors.

Question 2: Effective organizational structure and sufficient staffing

Apart from the issues with governance and mission, the accreditors were also

uncomfortable with both Livingston and Albrecht reporting directly to the WGU Board of Trustees. “Though we will refrain from saying unequivocally that a dual CEO structure cannot work,” the Committee noted, “we wish to point out the importance of WGU continuing to be mindful of the efficacy of a dual CEO track as the institution develops” (Inter-Regional Accreditation Committee, 1997). The executive directors were more blunt in their initial appraisal of this structure: “Why is this structure appropriate?” they asked. “Why doesn’t it contain the seeds for administrative conflict?” Apparently they thought the dual CEOs would quickly become dueling CEOs (Crow et al., 1997). Staffing, too, was a significant issue for IRAC. The WGU’s draft response to the eligibility requirements predicted that about eighty new people would be hired by the institution during its initial years of operation (Western Governors University, 1997a). This was a far cry from the eight people who constituted the entire staff when the initial draft response was written. IRAC was questioning whether WGU had the staff to get started and to coordinate the development of an institution expected quickly to grow ten-fold.

By the December meeting, however, the WGU had nearly doubled its number of employees, and had concrete plans to hire several more staff in the next six months. Curriculum and assessment specialists, academic administrators and advisors, a financial officer and public relations director, were all funded positions in the process of being filled by the WGU Board and senior officers. Staffing appropriate for enrolling an initial group of students was expected by late spring, 1998. IRAC was shown an organizational chart that explained how each administrative and academic position fit into the institution’s planned functions. And the ‘dual CEO’ structure was presented as a

functional system of leadership given the strengths of the two executives. While they both reported to the Board, they actually had quite distinct responsibilities -- together they functioned as a single CEO rather than as two competing chief executives. And, in addition, a strong relationship had developed between Livingston and Albrecht over more than a year of working together, and no conflict was evident. The Committee was assured that if and when it became practical to move to a more traditional organizational structure, the Board would not hesitate to make that change.

Question 3: Who are the Faculty?

While responding to IRAC's administrative and governance questions was relatively straightforward, addressing the Committee's concerns about WGU's faculty was considerably more difficult. IRAC had a tough time getting past the notion of an institution of higher education which had no educators on staff. The WGU was a non-teaching institution according to the original vision statement, and it had stuck rigorously to this self-conceptualization throughout its development. But the accreditors still wanted to know who was in charge, academically. Who was responsible for the WGU as an academic institution, as a university with a curriculum that IRAC could accredit? Recognizing, and even accepting, that the WGU was not going to be responsible for instruction, the Committee still generally felt that there should be a group of faculty-like people doing faculty-like things before the WGU could be accredited.

In the December presentation, the WGU approached this question from a different perspective. Rather than identifying the people who would be the equivalent of faculty in the WGU model, the staff first identified a set of "'traditional' faculty functions" and then showed how these functions would be handled in the WGU's alternative academic

structure (see Table 4 in Appendix B). Curricular design and assessment would be covered by various Program Councils and an Assessment Council. Full-time WGU staff would advise students on academic requirements. Overall planning would be done by Academic Officers with terminal degrees in the relevant disciplines. And instruction would be the responsibility of outside educational providers, approved by a WGU committee after a review of their education credentials.

These Councils and staff positions were described in some detail for IRAC, emphasizing the qualifications of the individuals who would be serving in the various roles. An Educational Provider Review Council would consist of academics and industry representatives with experience managing or evaluating distance education. It would assure the quality of those institutions providing instruction through the SmartCatalog. Each Program Council would be made up of appropriately credentialed academics as well as experienced people in industry, and would be the "official faculty governing body" for the program (Western Governors University, 1998f). The membership of the Assessment Council would include experts in evaluation instruments and methodologies. This group would be "responsible for working with the Program Councils, assessment development vendors, and WGU staff to ensure that assessments developed were appropriate tests of the performance descriptions identified by the Program Councils" (Western Governors University, 1998f). The members of these Councils would serve part-time, taking some time away from their regular employment in industry or the academy to participate in developing the WGU curriculum and instructional capacity.

With this mixture of part-time assistance from those serving on the Councils and full-time WGU staff serving in planning and advising roles, the WGU made the case that

all of the traditional faculty functions would be adequately and appropriately covered. The WGU would not have a faculty. Nevertheless, the role of the faculty was preserved in the WGU model and, through this multifaceted structure described by the WGU staff, academic responsibility for the curriculum was maintained.

Question 4: General education in the curriculum

Apart from concerns about the faculty, the members of IRAC also wanted to know what the vision for general education was for the WGU. “We said own it,” one executive director commented. “Lay claim to it. Explain why it is important. As opposed to saying, well, we know it needs to be part of degree, and we have looked at a hundred and some different schools and this is what it looks like” (Interviews). This was a literal criticism of the process followed by the WGU. NCHEMS originally designed general education for the WGU by tallying the course requirements for transferable associate’s degrees from fourteen western states (National Center for Higher Education Management Systems, No Date). The common components became WGU’s general education. IRAC found the result hollow, and wanted to see “what is meant by and what is the essence of a competency based general education program” (Inter-Regional Accreditation Committee, 1997).

In response, WGU staff put together an outline of the requirements for the institution’s degree programs, and demonstrated how general education would be integrated into the curriculum. The staff also highlighted the ways in which the assessment of general education could be conducted, both with existing assessments (e.g., National Center for Higher Education Management Systems, 1997b) and with portfolios. But this still missed the mark. What IRAC was actually looking for was more

of "a basic philosophical statement that undergirds WGU's approach to a collegiate level education," an idea that the executive directors had tried to stress earlier in the process (Crow et al., 1997). At the December meeting, according to Ewell's (1997b) memo on the subject, an "apparent lack of attention to the 'soft side' of student learning -- presumably what occurs through direct interaction and residential living -- made some folks uncomfortable." The problem was not so much with what was being required for general education, but why it was being required and how it seemed that the WGU was reducing liberal learning to a sterile set of competencies.

Neither the WGU staff nor the NCHEMS consultants anticipated this issue (Interviews), but it was easily rectified. A ten-page document (National Center for Higher Education Management Systems, 1998) was drafted which reflected the rationale for the general education requirements, expressed in the "traditional" language that the members of IRAC would be "used to hearing" (Ewell, 1997a; Interviews). This document showed just how traditional the WGU could be. The introduction, quoted here at length, could be inserted into the catalogs of any number of colleges or universities without much trouble.

> This [general education] requirement reflects the institution's strong commitment to ensuring that all its graduates possess a common body of knowledge and skills that are needed for both personal fulfillment and for success in the modern world and workplace. Directly responsive to the needs of employers in the Western states in their initial design, WGU's academic requirements are entirely consistent with numerous recent reports on the importance of core skills such as problem-solving, interpersonal communication, and quantitative and computer literacy -- as well as other attributes like tolerance for diversity, ethics and personal responsibility, and teamwork -- in meeting of the needs of the modern workplace. Consistent with the views of the institution's founding Governors, moreover, WGU's general education requirements reflect an equally strong commitment to produce responsible and informed citizens -- individuals capable of understanding and evaluating complex arguments and claims. Finally, the institution's general education requirements reflect its affirmation of basic values of collegiate education itself -- most particularly, that all graduates of a higher education institution should have experienced broad exposure to a variety of academic disciplines and should be able to demonstrate such

> skills as communication and critical thinking across a range of diverse subject areas. (National Center for Higher Education Management Systems, 1998)

Overall, this "Rationale for General Education" (National Center for Higher Education Management Systems, 1998) gave value to the process of education within the outcome-based WGU model. For the accreditors who were looking for some indication that the WGU had "an intellectual heart" (Crow et al., 1997), it was a comforting response.

Question 5: Competencies and transferability

The accreditors had several issues here which went beyond questioning how students would transfer in to WGU's programs. Their concern was more precisely how the WGU competencies would relate to the traditional credit-based model used almost exclusively at other colleges and universities. The WGU was "essentially saying that they do not trust the coin of the realm," according to one accreditor (Interviews). Credits as academic currency would not be supported by the WGU in any way. A student who had received straight A's in a traditional college curriculum would receive no advance standing at the WGU. He or she would still be required to take -- and pay for -- the required competency assessments. Conversely, a student who begins her or his study at the WGU would have no credit equivalencies to apply toward a more typical college degree. Finally, a student who takes a class from a traditional institution on the recommendation of a WGU advisor but does not then pass the competency assessment, would have received neither course credit nor a WGU credential for his or her effort. Regardless of the 'grade' that might have been received if the class had been taken for credit, the student would have in essence failed.

Some people were offended by the WGU's rejection of credit-based learning,

especially when the rhetoric preferred by the governors tended to denigrate it as "seat-based" (Interviews). But when they changed the relevant eligibility requirement, eliminating the credit-hour stipulation, the members of IRAC recognized that there was nothing magical about the unit. "All of us sat there with policies saying that institutions are free to set their own transfer policies," said an executive director. "So there is absolutely no way that we can suddenly we can come up and say, well folks, accreditation means that you accept the credit" (Interviews). But what IRAC could do is insist that the WGU staff think through how their system would interact with other institutions, making sure that students, as consumers, would be able to understand it.

While the WGU would never accept an individual professor's exam in lieu of the formal competency assessment, the institution would allow any student to move directly to certification of mastery. This would be similar to a traditional institution requiring an Advanced Placement exam for an incoming first-year student, rather than directly accepting the high school course for credit. The difference was that the WGU would apply this principle to all potential students, no matter what their previous experience. For a student transferring out of a WGU program, the burden would be on the accepting institution to translate WGU competencies into credits. The WGU would award what it called Certificates of Mastery to students after they completed an assessment, and these could be accepted at a traditional institution as the equivalent of perhaps six or nine credits (Interviews). From their conversations with traditional colleges participating as educational providers for the institution, the WGU staff did not expect schools interested in enrollment to balk at this (Interviews).

As for the student who does not pass the competency assessment after taking the

recommended course -- different institutions have different standards. What counts as passing at a community college might be very different from what is acceptable in the Ivy League. As an independent academic institution, the WGU should be allowed -- indeed it should be expected -- to have its own standards, enforced independently of what other institutions accept. The WGU staff conceded that it would not seem fair if a recommended course sequence did not generally provide the student with the skills he or she would need to pass WGU's assessment. This information, however, would be available to both the student and advisor, and would certainly influence future recommendations and student choices. There is a corollary here, as well, to traditional institutions. Law schools, for example, graduate students that may not pass the bar exam. The obligation to correct this problem is directed toward future students, not the student who failed. The WGU staff suggested that they would think similarly regarding their own students and assessments.

Question 6: Planning and evaluation

The WGU staff could only prepare a preliminary response to the concerns IRAC expressed regarding the WGU's capacity for planning. The primary eligibility requirement regarding this was added after the second draft response to IRAC was submitted -- as a last minute request, it could be put on hold: "[IRAC's] request for a 'Three-Year Plan' seems a bit presumptuous," said an NCHEMS consultant, "given that we have less than three weeks to respond to this essentially new request!" (Ewell, 1997c). At the December meeting, the WGU staff reiterated their commitment to working with IRAC to achieve full accreditation, and supplied the Committee with a revised business plan and other planning statements. This response was not adequate. "IRAC's feeling

[was] that the various planning documents supplied were not effectively integrated with one another," said Ewell in his summary of the meeting (1997a). Taken together, the documents read like separate reports written by disconnected consultants -- which even the consultants acknowledged was often the case (Interviews). The executive directors had commented earlier that "WGU appears to us to be a compilation of planning projects rather than a 'whole' institution" (Crow et al., 1997). The WGU would be required to fix that impression before becoming eligible for accreditation.

It is not exactly clear how the WGU staff managed to satisfy the accreditors on this point, unless it was by dint of repetition. It seems as if IRAC, confronted yet again with the WGU asserting its existence as a independent academic institution, ultimately decided not to nit-pick the issue. The concern was still there, but it no longer was an issue for eligibility (Interviews). On the issue of evaluation, as well, a general response regarding "institutional-level institutional research and evaluation, emphasizing the ways in which evidence of effectiveness will be assembled" (Ewell, 1997a), was all that was necessary. As an organization devoted to assessment, the WGU probably was on stronger ground than most with respect to this requirement. At any rate, despite the problems with the WGU's December response, IRAC did not hold up approval because of concerns about planning and evaluation.

Question 7: Control over outsourced functions

Not only did the WGU staff plan on having teaching be external to the institution, they also anticipated having outside sources for student and library services, administrative management and financial services, and assessment administration. IRAC was concerned that with so many activities being handled by outsiders, the institution

would become little more than a holding company. The accreditors wanted to know that the University was "not just marketing something," but rather was actively engaged in the educational enterprise (Interviews). The staff covered part of this concern in their response to IRAC's questions about the faculty of the institution. But not only did the accreditors wonder how a university could exist without a faculty, they also questioned whether one could exist without a library, administrative support, or a full complement of student services.

At the December meeting, the WGU staff met this critique with copies of the contracts that had recently been signed with various providers. Washington State University, for example, would provide back-office functions and financial services for the WGU. Follett Campus Resources would manage the distribution of the institution's instructional materials, as well as "the inevitable university memorabilia, from T-shirts to monogrammed supplies" (Western Governors University, 1997f). Library services would be provided by the library at the University of New Mexico -- ranked nationally as one of the top fifty research libraries (Chronicle of Higher Education, 1998c). Assessments and direct student services would be conducted through centers located in each of the participating states, often at the local community college or corporate testing center. Each of these functions would be institutionally managed by WGU staff -- a Chief Assessment Officer, the Director of Provider and Student Relations, and so on -- and the contracts made clear that these individuals were in charge.

This was a different organizational model to be sure. But the WGU argued that the contractual relationships already established demonstrated adequate control and oversight over administrative functions. And the academic Councils and newly hired staff

members described previously played a similar role for the outsourced instructional capacity. Also, the WGU staff were able to emphasize the traditional credentials of their outsourcing partners -- a research university, an established campus bookseller, existing colleges and universities. They were not going to rely on some fly-by-night operator, or affiliate with a provider who had questionable intentions. The immediate concerns of the accreditors were satisfied by this display, and they accepted that the WGU had at least the structures in place to successfully manage such a dispersed enterprise.

Final eligibility submission and decision

Peter Ewell, the NCHEMS contractor primarily responsible for the accreditation process, complemented Livingston and Albrecht after the December meeting "I thought that things went extraordinarily well," he said. "The presentation was well-organized and delivered, the questions were cogent and for the most part friendly" (Ewell, 1997b). Later, in a meeting with the executive directors (National Center for Higher Education Management Systems, 1997a), the WGU learned just how well it went. The conclusion that came from the December meeting was that, despite continued misgivings about the WGU on the part of some Committee members, the fact that the institution would not be delivering instruction was not going to be an obstacle to accreditation. Nor was outsourcing or the competency-based model. The design itself, in fact, was no longer much at issue; rather the primary question for the final eligibility submission was whether the WGU could bring the design to fruition.

There were several "minimum deliverables"(Ewell, 1997a) that the members of IRAC required the WGU staff to produce before considering the final application. They

wanted to see the academic Councils fully staffed. The on-line catalog needed to be available for review. The WGU would have to establish its tuition and fees, have the initial assessments in place for the competency-based degrees, and have the authority to operate as an educational institution within at least some of the member states. Most of these items were already in progress, and completing them did not pose much difficulty. By the spring of 1998, the WGU was able to operate in three states, with others awaiting the accreditation decision. Tuition and fees -- relatively small charges for applying to a program and for taking WGU assessments -- were set by a simple vote of the Board of Trustees. The Assessment and Program Councils met for the first time in January and February of 1998, and were engaged in the oversight of the first degrees throughout the spring. The membership of the Provider Council was reviewed by the Board of Trustees in February, and had its rules and policies finalized by April. And with a flurry of hiring during the first quarter of 1998, the WGU became fully staffed administratively as well.

The main difficulty was with the on-line catalog. The technology behind it was more complicated than had originally been thought, and the original version completed by IBM in early 1998 was not, in the polite words of one consultant, “what everyone thought it was going to be” (Interviews). Development was taken over by another company, Innovative Interactions, Inc., but it soon became clear that the spring deadline for IRAC was not going to be met. The WGU staff decided instead to create a “hybrid site” just for the accreditors so they could see how the catalog would work once it was finished (Interviews). It took weeks to create a web-based demonstration catalog for this purpose, and little progress could be made on solving the problems of the real catalog during that time. But eligibility was so tantalizingly close that this was a small price to

pay to forestall another delay in the process. Ironically, after all the time spent on creating the demo, it recorded no hits once it was posted on the web -- the members of IRAC never even looked at it, taking the WGU staff at their word as to the technical capabilities of the program (Interviews).

When IRAC next met in early May 1998, confidence was high that the WGU would be declared an eligible candidate for accreditation. The decision was nearly unanimous. Only one member of IRAC held back on the principle that an institution without an actual teaching faculty was not, and could not be, an institution of higher education. But the rest of the Committee agreed that the WGU demonstrated that it was eligible for accreditation. A press release from the WGU trumpeted the decision, calling it a "major milestone" in the development of the institution (1998h). IRAC's press release was more subdued, noting that "the evidence was sufficient to warrant the University's preparation to seek candidacy" for accreditation, while cautioning that "eligibility is not a formal status, but signals the beginning" of the formal accreditation process (1998b). But the executive directors of the participating regions, despite the careful words of IRAC's public announcement, recognized the significance of their action:

> It is a big step in the sense that it means that the four regionals have agreed that an institution of that nature -- that is going to certify competencies, broker instruction, unbundle faculty roles, everything that it is doing -- that we still see in it a potential for an accreditable institution of higher education. In that is a very different model, and therefore that is pretty important step for us to have taken. (Interviews).

It was an important step for the WGU, too. The WGU model, different though it was, counted as an institution of higher education.

The next steps the WGU and IRAC would take would be towards candidacy

status and then, within five years, a decision on full accreditation. During that period, the WGU would have to demonstrate the viability of its model in operation, not just in theory. It would not be an easy process, and the members of IRAC by no means considered the ultimate accreditation of the WGU a foregone conclusion. Questions still remained about the WGU's academic staff, its finances, and its relationships with outside providers (Interviews). A major concern centered on what one member of IRAC referred to as the "halo effect" -- that is, unaccredited institutions getting the benefit of accreditation through offering courses for WGU's students (Interviews). But these questions would all be addressed in the candidacy process. Just being considered meant the WGU had crossed the first hurdle towards academic legitimacy.

Accommodation

The WGU did not, as was seen in the previous Chapter, arrive at this stage with its initial revolutionary agenda completely intact. The WGU adjusted and adapted as much as possible without sacrificing its central purpose. The accreditors bent, too. Far from being the roadblocks to reform as the governors initially suspected, the relationship between IRAC and the WGU was regularly described as "very cordial [and] collaborative" (Interviews). But, like the WGU, the accreditors did not sacrifice their central responsibilities either. They did not rubber stamp the WGU's agenda or goals; rather they considered the implications of a competency-based curriculum in a non-teaching institution, and did not foreclose the possibility of the WGU creating a quality academic model. In fact, one of conclusions that came from IRAC's December 1997 meeting was that the WGU had "the <u>right</u> to try and bring about the achievement of its

mission without being totally circumscribed by IRAC" (National Center for Higher Education Management Systems, 1997a, emphasis in original). IRAC, however, was not going to compromise on quality -- a message that was clear to the WGU throughout the process (Interviews).

The accreditors and the WGU organizers found they were speaking the same language once all the rhetoric was stripped away and the focus was placed on the academic quality of this new model for higher education. This was unanticipated on both sides at the beginning (Interviews). On the one hand, the governors were surprised at how willing the accreditors were to create an entirely new structure and process to evaluate this radical institution. A story, told by a WGU consultant, however, shows how the executive directors responded during their first meeting with the governors in 1996:

> "You know Governors, this is a really wonderful, wonderful idea," [said one executive director], "but it just doesn't fit our standards" And the room became very, very quiet, and you could see the muscles on both Leavitt and Romer's face tense, and their eyebrows go up, ... and you could have heard a pin drop in the room [as the person continued], "But, we can change our standards!" [Since then,] they've been very, very, very straightforward in saying, "Look, let's find a way to work together. You're not going to come to us on bended knee and we're not going to roll over dead. Let's work together." And that's what they've done. (Interviews).

For their part, the accreditors were surprised by the Governors' commitment to accreditation and all it entailed. "To its credit," said Sandra Elman of the Northwest Association, "WGU has been very responsive to what the regional accreditation community has asked for" (1999). Elman told her own story about that first meeting with the Governors that illustrates the point:

> On September 30th, 1996, ... Governor Michael Leavitt very eloquently told my self and my two colleagues [Patsy Thrash of NCA and Ralph Wolff of WASC-Senior] that it was his hope, and he anticipated, that Western Governors University would receive regional accreditation by the summer of 1997. Well, I can tell you, I sat there, I swallowed hard, ... and I said, "With all due respect, Governor, regional

> accreditation does not quite work that way." And he listened. And we, my colleagues and I, explained to Governors Leavitt and Romer what's involved in becoming a candidate, and then becoming an initially accredited institution. Well, I wouldn't say their jaws fell open, because they are too distinguished and too savvy for that, but they were surprised. And the fact is that it was almost two years until the University passed the eligibility requirement stage. (Elman, 1999)

From a delay in accreditation that would be measured in years, to a willingness to change procedures and invent policies in a dramatic departure from convention, both the accreditors and the WGU's founders made accommodations and showed flexibility throughout the process. Both parties managed this, too, without giving up their respective founding purposes: The WGU was still providing competency-based degrees through distance education, and accreditation would still be the primary way of evaluating quality for degree-granting institutions. The end result was that the governors, along with the WGU staff and consultants, had developed a radical design for a university that nonetheless could potentially meet the rather traditional standards of the higher education community. And the accreditors, through their IRAC creation, had developed a process for evaluating a new class of postsecondary institutions which did not fit into standard definitions of traditional higher education.

Over the next few months, during the summer of 1998, the problems with the on-line catalog were solved and the WGU was ready to enroll its first students. The success of the venture was far from assured -- the accreditation vote did not change that. But eligibility could give "potential students confidence," according to a University press release, "in WGU's ability to deliver a quality program" (Western Governors University, 1998h). It also would allow the institution to gain the authority to operate in several additional states that required eligibility as a prerequisite to licensure. And maybe most significantly, the WGU staff could point to IRAC's decision -- indeed, the entire

eligibility and candidacy process that IRAC established -- as evidence of the founders' commitment to creating an academic institution of the highest quality. If it met the guidelines set forth by IRAC, the WGU would not become a diploma mill, as some critics feared (e.g., Noble, 1998). But it certainly would not be a simple continuation of the status quo, either. The WGU was a challenge to regional accreditation, not to mention the larger higher education community. IRAC accepted the challenge and committed to ensuring that the WGU would be a quality institution of higher education. This innovative academic model, set by the WGU and officially approved by the accreditors, could finally be introduced as an option in the diverse mix of American colleges and universities.

CHAPTER V

A REAL UNIVERSITY

On September 2, 1998, in San Jose, California, Governor Leavitt officially opened the WGU with the words, “It’s one small click for mankind, one giant leap for distance learning everywhere” (Cortez, 1998). A vision that began over three years earlier in the mountain resort of Park City in the Wasatch Range of Utah, had come to fruition in the technology environs of Silicon Valley. It was on the one hand an ironic place for the WGU to begin -- the Governor of California rejected participation in the institution two years earlier, and had started his own rival institution: The California Virtual University. On the other hand, San Jose was perfectly apropos, representing the heart of high technology like perhaps no other place in the country. For an institution that was born out of the transformative potential of telecommunication technologies, it was fitting for the initial click of the mouse to occur in a quintessential technology town. The real reason they came to San Jose, however, was a bit more prosaic. The CEO of the 3-Com Corporation, based in San Jose, was the Chair of the WGU National Advisory Board -- his offer to host the event and provide technical support for the launching of the new institution was simply good corporate philanthropy.

The governors opened a university different from just about every other institution of higher education in the United States. First of all, it had a tripartite academic structure, with students able to use the WGU to meet their educational goals in several different ways. Its degrees were different, too -- the WGU curriculum was

described solely in terms of outcomes, rather than the traditional lists of required courses. And the WGU made external relationships with other institutions central to its organizational model. The participation of its education partners was critical to its existence.

The accreditation community saw in the WGU an institution that they could accredit, however, despite these differences. But what was that institution? To answer this question requires explanation of the WGU's external relationships with education providers, its academic structure, and its curriculum. These pieces fit together to create a unique University, one that has captured the attention of both academics and politicians as an institution with the potential to change higher education.

External Relationships with Providers

Since the WGU does not offer instruction, it relies on external providers of education to serve its students. While technically any sort of institution or individual could be a provider -- from the publisher of an introductory statistics textbook to a private tutor in multivariate analysis -- in practice, the providers that can establish formal relationships with the WGU are strictly limited to certain types of organizations. These are the "affiliated" providers: colleges, universities, or other educational organizations which meet the criteria applied by the WGU's Education Provider Review Council (EPRC) (Western Governors University, 1998b; No Date-b). Since these institutions embody the instructional capacity of the WGU, the mechanism by which they are selected is a form of quality control for the academic functions supported by the WGU (Interviews).

The EPRC awards affiliated status based on a set of criteria specifically designed to limit participation to established organizations with a commitment to high quality distance education. All potential affiliates must have been in existence at least two years as providers of postsecondary education at a distance. They must follow the WGU standards for distance learning, based on the requirements developed by the regional accrediting commissions for programs offered by accredited institutions. And they must themselves be an accredited institution, or have courses that have been approved for college credit through the American Council on Education (ACE). Other providers may be approved if they can demonstrate that they offer programs or courses "widely recognized in their field" for quality and need (Western Governors University, 1998b). With these regulations, it is little wonder that nearly all the affiliated providers are existing colleges and universities. Neither individual entrepreneurial instructors nor untested start-up companies could be approved under the current criteria.

Affiliated providers are allowed to list distance education programs and courses in WGU's SmartCatalog, a searchable database accessible via the web. The WGU does not screen individual submissions to the SmartCatalog, though the providers that become affiliated under the "widely recognized in their field" criteria can only list those courses and programs designated as such by the EPRC. Because they are presumed to have been vetted in the accreditation process, providers that are fully accredited can list as many courses and programs as they wish. The ACE-approved institutions also have the ability to list anything as long as ACE has declared it eligible for college credit.

The original SmartCatalog that debuted in September 1998 listed 194 courses from 20 education providers. Only one provider was not a college or university -- Novell

offered a single course in on-line teaching -- and none had created a course specifically for the WGU. Each affiliated provider simply submitted a few courses that they had already developed for their pre-existing, and already quite extensive, distance education programs. Few attempted even to identify their courses with WGU competencies. For the most part all were typical credit-bearing courses much like one would find available at colleges across the country.

This was a modest beginning, perhaps because the immediate benefits of affiliation were unclear. A WGU information sheet on the topic (Western Governors University, No Date-b) suggested that listing with the WGU will indicate a high standard of quality for an institution's distance-delivered courses and programs. In this respect, affiliation is similar to a "Good Housekeeping seal of approval" -- a point frequently mentioned during development of the institution (Interviews). But since almost all of the providers would have to meet the more rigorous demands of regional accreditation or the ACE credit approval process, it is not clear whether affiliation with the WGU would add much to perceptions of quality. The same information sheet also noted that affiliated providers could "support their educational offerings globally with the extensive student support services available through the WGU." The distance learning guidelines to which all providers must adhere, however, already require the institutional provision of library resources and support services appropriate for the programs they offer (Western Governors University, 1998b). At least initially, it is unclear what extras the WGU might offer that would provide a value-added service for either the institution or its students. What, then, was the motivation for affiliating with the WGU and listing these courses in the SmartCatalog?

There were three reasons these institutions decided to become affiliated providers. The first reason was because the Governor expected it. Most of the initial providers were nominated by their governors to participate in the development of the WGU as "pilot" providers (Western Governors University, 1997h). Representatives from these institutions helped the WGU staff get the new institution off the ground by advising on academic policies, testing the SmartCatalog, and developing marketing strategies to attract students. Based on this initial involvement -- instigated by the governors -- most continued as regular affiliated providers when the WGU opened. As one campus representative remarked, "I know that [the Provost] has said frequently that we can't disappoint the governor. So I know it is very important to him. And we won't disappoint the governor. We're going to be full partners in the WGU" (Interviews).

The second reason for participating in the WGU was for promotional purposes. One institution (which was not among the pilot providers) wanted to participate because "this will basically be an advertising opportunity for us (and a highly visible one, from a political standpoint)" (Wherry, 1998). With the governors focusing on distance learning as a solution to the problems of traditional higher education, some institutions wanted to highlight what they had already been doing on this front. Getting involved with the WGU was seen as a good way to let the governor know that the institution was open to change, and not a barrier to it. But probably more significant than that was the newly-affiliated providers' interest in promoting their distance learning offerings to students outside their geographic regions. This was a potential money-maker for these institutions if the WGU attracted anywhere near the number of students projected. With the WGU charging listing fees as low as $100 per course (Western Governors University, 1998d), enrolling

even a few dozen more students was seen as being worth the effort (Interviews).

Finally, many providers decided to participate in order to get in on the ground floor of something that could prove to be big in the future. One campus representative noted that gaining experience with competency-based learning was an important aspect of his involvement.

> I think were going to look back in ten years and say gosh, can you remember we gave grades? Isn't it hilarious? But, it's so new. We have a saying around here, we've been to the future and it's terrifying! Because, literally, I think were looking at a real paradigm shift in the way we develop curriculum, in the way we assess students, the way faculty teach, all that. (Interviews)

Others were not so sure about competencies, but they were interested in cross-institutional collaboration through distance education, and in helping their own students take advantage of programs offered elsewhere.

> [Our institution] is not going have a degree in fire ecology. But, guess what, Missoula Montana has one. And so, if Missoula Montana wanted to get in WGU and somehow figure out how to train firefighters in the forest, we'd probably say great, [and] let [our students] learn it through the WGU because we don't have the resources to put out an entire curriculum in something that specialized. (Interviews)

It was the experimental nature of the WGU that encouraged much participation (Interviews). Whether trying out new ways of assessing learning, or new ways of delivering and accessing educational resources, the affiliated providers were all entrepreneurial institutions interested in trying something different.

Academic Structure

Of course the WGU was interested in trying something different as well. The affiliated providers had their reasons for listing courses and programs in the SmartCatalog. And once they were there, the WGU could employ them in its own way to

help students meet their educational goals. The institution that opened in the fall of 1998 had billed itself as a competency-based institution that offered on-line access to courses and programs (Western Governors University, 1998i). But what did that mean? What would a student looking at the WGU find? By logging on to the institution's home page the student could see nearly 200 courses from institutions across the West listed in the trademarked WGU SmartCatalog. There would also be a few degrees and certificate programs offered completely through distance education -- not by the WGU, but by other colleges and universities. And there would be two competency-based programs -- an Associate of Arts (A.A.) and an Associate of Applied Science in Electronics Manufacturing Technology (EMT) -- the actual WGU degrees.

These categories of courses, programs, and WGU degrees represent the three options open to a student seeking the WGU experience. This tripartite academic structure had its origins in the options for a virtual university presented by WICHE at the 1995 Governors' conference in Las Vegas. At that meeting, where the WGU idea was first publicly discussed, WICHE staff offered what they called a "continuum of possibilities" for the governors to consider: a virtual catalog, a virtual university, and the Next Generation Virtual University (Western Governors Association, 1995b). Later, when Dennis Jones was tapped to write the vision statement for the WGU, it was decided that the "scope and scale of the initiative should cover all three of the options discussed at the meeting in Las Vegas" (Quinn, 1996). These three options have their rough equivalencies in the Clearinghouse, the Open College, and finally the WGU competency-based degree programs.

Clearinghouse

The WGU Clearinghouse is somewhat like what was envisioned in WICHE's virtual catalog option: the WGU SmartCatalog acts as a central location for students to access distance education degree and program opportunities from affiliated education providers. Students find the program in which they are interested through the SmartCatalog, and then contact the provider directly for admission. The WGU's involvement is limited to providing the initial contact information. In this respect the SmartCatalog functions much like an on-line Peterson's Guide of distance learning opportunities, with the WGU simply being the organization which hosts the web site. Since acceptance into the program, tuition and fees, grading, evaluation, and the awarding of a degree or certificate are all the responsibility of the provider, not the WGU, the students are not even considered WGU students. According to official WGU terminology (Western Governors University, 1998f), they are "users" of the information the WGU has collected, individual "browsers" on the WGU web site.

The benefit to the students of this Clearinghouse arrangement is an easy, "one-stop" access to a wide range of programs and degrees (Western Governors University, No Date-b). Instead of having to research each institution individually for a program of interest, students are able to look at several all at once. For WGU affiliates, the Clearinghouse offers the benefit of providing access to students that might not otherwise hear about their distance education programs. At the same time, there is little risk involved. All aspects of the course, from student enrollment to student evaluation, are controlled locally, and the education provider does not have to do anything different than what is already being done with the program. Tuition can still be differentiated between

in-state and out-of-state students, if so desired. The courses do not need to be competency-based. No transfer credit needs to be considered. Pre-requisites and admission standards can be enforced. And the affiliate deals directly with the student, without having to go through the WGU as an intermediary.

The Clearinghouse makes it easy for both students and institutions to participate in the WGU. It represents, as a staff member explained,

> the things that all of our constituents understand -- it is program based, it is credit based, there is no talk about competencies. Students would be using the [SmartCatalog] as a place to find out about programs that exist at a distance. And everybody understands that.

The WGU is interested in moving beyond what everyone understands, however. The Clearinghouse allows academic institutions and potential students to use the WGU in a limited way, hopefully raising their comfort level with the institution as a whole -- including its more radical elements (Interviews). Just as with WICHE's original presentation of the "virtual catalog" in Las Vegas, the Clearinghouse represents the first step in the continuum of possibilities for the WGU.

Open College

The Open College represents the next step. Analogous to WICHE's virtual university option, the WGU's Open College allows the student to access the individual classes which make up the programs listed through the Clearinghouse. Different from the WICHE plan, however, the WGU does not provide a credit bank for students, nor does it award degrees through the Open College. But the WGU does keep composite academic records for the students to facilitate the eventual transfer of any accumulated credits to a regular degree program at another institution. And, technically, Open College students

are still not official WGU students. They remain enrolled only with the affiliated educational provider, which awards the credit for the course and provides the actual transfer transcript. The main difference between this and the Clearinghouse is that the Open College deals in individual courses, while the Clearinghouse only handles complete degrees and programs. One can think of the Open College as being rather similar to taking a summer class at the local community college and transferring the credits to another university in the fall. The WGU falls in the middle of this transaction, offering convenient point of access for the student to the specific course he or she needs and, of course, collecting a fee for acting as a conduit.

Nevertheless, the WGU is not totally neutral in the process. Its agenda is to encourage the acceptance of non-traditional learning experiences by traditional colleges and universities, and, conversely, to encourage the use of traditional courses in non-traditional ways. Affiliates that start by offering entire programs through the Clearinghouse, can make the individual courses from the program available to other non-degree students in the Open College. The educational provider might then start accepting courses offered by other institutions as part of the original Clearinghouse program, ultimately to the extent of recognizing the learning achieved through, for example, a course offered by the Micron corporation. The Open College, so named because it literally opens up the possibilities for students, provides the central mechanism through which these arrangements can begin to occur.

WGU Degree

The competency-based degree-granting function is the final step in the continuum of possibilities that the WGU offers -- the Next Generation Virtual University. Using the

instructional capacity developed through the Clearinghouse and Open college, the WGU awards its own competency-based degrees. It is in this way that the WGU actually acts as an independent academic institution. Just as a traditional college or university would do, the WGU decides on requirements, admits students to the degree program if they are qualified, advises students on completing the requirements, and awards a degree when a student has successfully completed all necessary work for the program of study. And, unlike the Clearinghouse or Open College, the students are WGU students. They pay WGU tuition, and they receive WGU degrees.

The degrees are awarded, however, based on competency assessments rather than the accumulation of credit. Courses available through the Open College can be used to provide learning opportunities for WGU degrees, but the courses themselves have no meaning for the WGU. Only the successful completion of a competency assessment is rewarded with a WGU credential. A student enrolling in a WGU degree program would not even necessarily have to take a class -- work experience, independent study, and CD-ROM tutorials would be additional ways to gain the skills and knowledge associated with the designated competencies. And if the student did decide to take a class, it would not have to be one listed in the SmartCatalog by an affiliated provider, nor would it have to be through distance education. A course at the local community college could work just as well.

Still, the SmartCatalog is designed to be the central repository for the learning requirements for WGU degrees. For the WGU, however, these requirements are not courses, they are performance descriptions -- statements that define the discreet skill or piece of knowledge that will be assessed for the competency-based degree (Western

Governors University, 1998f). This gets confusing because the catalog also contains the courses listed by the affiliated providers. In any other university, the courses in the catalog would have a direct relationship to the degrees eventually awarded, but at the WGU, only the performance descriptions matter. Affiliated providers may map their courses to these performance descriptions -- in essence indicating what competencies a student should expect to gain from taking the class -- but that is not a prerequisite for inclusion in the SmartCatalog. Hence many courses in the SmartCatalog have little bearing on the degrees the WGU actually offers. Also, few other institutions of higher education offer degrees without providing the access to instruction necessary to earn them. But with the WGU, it would not be unusual for a competency necessary for a degree to lack a corresponding course in the SmartCatalog. The WGU, however, provides competency-based degrees. It does not offer competency-based courses.

As the WGU staff person quoted above noted, most people understand how the Clearinghouse works. The Open College, too, has its rough corollaries in the traditional practice of transferring course credits between institutions. The degree-granting function, however, is more confusing because it is, in so many ways, a different model of education than what is offered at other colleges and universities. It is this aspect of the institution, however, which has attracted the majority of attention. From the foundations to the accreditation community, the competency-based degrees are, in most people's eyes, what makes the WGU so interesting.

Design of WGU degrees

The NCHEMS consultants developed the framework for the original competency-

based degrees: an Associate of Arts (A.A.) and an Associate of Applied Science in Electronics Manufacturing Technology (EMT). These degrees were chosen for several reasons. First of all, because the A.A. and the EMT were respectively academic and vocational programs, they were seen as prototypes of the various degrees that the WGU could offer in the future. Secondly, because the goals of the governors included providing greater access to college, the A.A. was selected to demonstrate a transferable competency-based program covering the lower divisions of an undergraduate program. Third, the EMT program was a direct response to the demands of the telecommunications industry in the western states (Jones, 1996). And finally, the programs allowed the WGU to develop representative sets of competency-based modules which would form the basis of future degrees (Interviews).

These modules, which the WGU calls domains, are the basic building blocks of the degree programs. Each domain is made up of subdomains, and the subdomains contain the descriptions of competencies which the student would need to demonstrate. For example, as Table 5 in Appendix B shows, the EMT degree has six domains and each domain has between three and eight subdomains. The subdomains are defined by sets of rather specific performance descriptions. So, for example, a performance description for Applied Quantitative Reasoning Skills domain, Statistics/Probability Skills subdomain, is "Work with data to develop a design to test a hypothesis in a real world setting, and use statistical techniques to confirm or deny the hypothesis" (Western Governors University, 1999a).

The exception to this is the distribution domain. Every WGU degree requires students to demonstrate proficiency in several traditional academic subjects. The EMT

degree requires course-equivalent assessments in three areas -- natural science, social science, and the humanities. The A.A. degree adds history to this sequence. The purpose of these assessments "is not to ensure that students possess a particular body of disciplinary knowledge," stated a draft description of the A.A. degree, "but rather that they have been exposed to a variety of disciplines in some depth" (National Center for Higher Education Management Systems, 1997c). Hence, there are no specific performance descriptions for these requirements. It is expected that students will take assessments that reflect the content of a typical first or second year course in the subject -- Organic Chemistry, American Government, or British Literature were some of the examples given for the benefit of the accreditors (National Center for Higher Education Management Systems, 1997c). An extensive list of potential assessments was developed by NCHEMS in support of this requirement (National Center for Higher Education Management Systems, 1997b), including Advanced Placement exams and DANTES subject tests originally developed for the military.

The EMT description of the distribution requirements argues that "in addition to making people more employable, a college education also makes people better citizens and gives them wider perspectives on their world" (Western Governors University, 1999c). It is this general education component -- which was so important to the members of IRAC -- that the distribution domain is expected to fill, rather than the more typical domain goals of skill acquisition. But on a practical level, the WGU staff and NCHEMS consultants recognize that there is no way at the present time to define precisely what was meant by being competent in, say, history. The best they can do is require the course-equivalent examination and continue to let the college professor decide.

Other than for the distribution requirements, all other assessments are conducted at the domain level. That is, while performance descriptions and subdomains are stipulated and specified, they are not assessed separately from the domain under which they fall. In addition, completion of the domain-level assessment is recognized by a certificate of mastery or completion. This allows students to present the certificate as proof of a marketable skill -- or for potential transfer to another institution -- even before receiving a full degree (Interviews; Western Governors University, 1998e). In addition, as the domains are modular, the WGU staff can use them as building blocks for future degrees. An NCHEMS consultant described this concept:

> Once again, recognize that ... the intended structure is modular. Meaning that this -- the EMT degree -- as the prototype vocational degree, is intended to pilot the use of several of these pieces. They can be reused. So for example, mathematics is mathematics. Basic work-related skills is basic work-related skills. If, for example, the next vocational degree to be looked at were a dental technician or something like that, these would be pretty much already in place. (Interviews)

Because of this modularity, the two years spent determining the content of the original degrees was substantially less for subsequent degrees.

The content is, of course, the critical component. The A.A. degree, for example, contains about 200 individual competency descriptions[2], all of which underwent multiple levels of review with industry representatives, faculty from relevant academic departments and assessment professionals. The process of developing a WGU degree begins with a series of consultations with representatives from industry and academia to determine the need for and the scope of a program. A WGU academic officer then establishes a new Program Council to identify the main skill and knowledge areas for the new program, decide the appropriate level at which they should be learned, and write the

individual competency descriptions that reflect the skill being assessed. The Program Council works in conjunction with the Assessment Council to identify and approve appropriate assessments for the program (Western Governors University, No Date-a).

Once the assessments are approved, the competency domains and associated performance descriptions for the program are listed in the SmartCatalog and made available to the WGU's affiliates. These institutions, if they so desire, can develop courses and learning modules that address the competency domains for the new program. Alternately, the institutions could examine their pre-existing courses to determine the extent to which they meet the newly identified competencies. Interested students who enroll in the program are assigned WGU advisors to guide them through the process of completing the required competencies. When a student has mastered the skills necessary for a particular competency domain, she or he travels to the nearest local center -- there is at least one in each participating state -- where a proctor is available to administer the assessment. In addition, all students are expected to maintain a portfolio documenting the progress they are making toward their degree. After a student has completed all the assessments, the Program Council reviews the portfolio and, if everything is acceptable, formally recommends him or her to the Board of Trustees to confer the degree.

A Model of the WGU's Educational Activities

The WGU is a complex organization. Students can enroll in courses without being students, and can be students without enrolling in courses. The SmartCatalog lists instructional content for degrees that have little to do with the WGU. Various councils

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[2] See Appendix D for a complete list of the competency descriptions for the A.A. degree.

serve as the faculty for programs offered by the institution, but no one teaches. The curriculum is defined by the assessment of competency domains which students master through a variety of learning experiences -- none of which need involve sitting in a classroom.

In an effort to bring some clarity to this description, a model of the WGU's academic activities is given in Appendix B, Figure 1. Based on interviews with WGU staff and consultants, the model indicates the connections between the student, SmartCatalog and the provider institutions, separating students enrolled in degree programs from the Open College and Clearinghouse students. Note that the only way to earn a WGU degree is through completion of the competency assessments taken in fulfillment of the WGU-specified curriculum. Credit-bearing courses, on the other hand, only have value to the Clearinghouse and Open College students. The SmartCatalog is not a "black box" where content goes in and credentials and competencies come out (Western Governors University, 1998j). It is more like a holding tank for relatively traditional instructional services, which can then be used by students for their own purposes.

A few points should be emphasized regarding the WGU's educational activities. First of all, while it is true that traditional and non-traditional providers can list content in the SmartCatalog, only the traditional providers can offer their content for credit. The WGU does not have anything to do with awarding credit, regardless of how a student might use its services. In addition, WGU credentials can be earned without ever enrolling in content contained in the SmartCatalog. In fact, it is expected that most, if not all, WGU students will design their degrees around a variety of learning experiences, only some of

which would be course work taken through the SmartCatalog (Interviews).

The final point of emphasis relates to the WGU's administrative control over its academic activities as a whole. Since educational providers and students alike can participate in the WGU without ever engaging in its core degree-granting function, the WGU actually has limited authority over much of what goes on under its umbrella. The shaded areas in the model represent the extent of administrative control that the WGU does have. It can set academic policy and admit WGU students, but it has no control over Open College or Clearinghouse students. The WGU maintains the SmartCatalog and grants permission to institutions to list courses, but the providing institution decides what courses to list and what the content will be, how it will be taught, and the basis for evaluating students enrolled in its courses. None of the content is under WGU control. But the institution does control the assessment process for WGU students (as opposed to Clearinghouse or Open College students) and makes the final determination as to who earns the WGU degree. Generally, however, only a small percentage of the students involved in the WGU are expected to be degree-seeking (Monitor Company, 1997). Enrollment in these programs could be as low as five percent by one trustee's estimate (Interviews). Still, because the WGU expects tens -- even hundreds -- of thousands of students to participate overall, even this represents at minimum the student population of a mid-sized university (Monitor Company, 1997).

Success

That enrollment projection shows the ambition of the WGU. From the beginning the governors set their sights high, and the people now running the institution are

beginning to see if the idea is as big as Governor Romer liked to say. So far, it is impossible to say. But as one technology executive stated, “The starting point of success is that first of all it has to exist” (Interviews). Right now, the WGU is an institution with goals not unlike many other colleges and universities. It wants to improve access to high quality education. It wants to be innovative in creating a student-centered learning experience. It wants financial stability and the ability to expand its academic offerings. It wants to make sure its press is good and it is not above a little shameless self-promotion. All in all, whatever it might be in the future, the WGU is currently just a new institution of higher education, following a long tradition of other new institutions, begun with a powerful idea and brought to shaky realization by people who thought they could do something different. Many of these institutions did not survive. But some did. Right now, the WGU is just aiming to be one of them.

CHAPTER VI

A SYMBOL OF CHANGE

The WGU is an innovative institution that has been watched closely since its inception as a leading force for changing traditional higher education. Just looking at the WGU itself, however, it is a little difficult to understand why there has been such a fuss. Not very many students have enrolled. It has a rather limited curriculum. Its accreditation status is tentative. There has been no rash of imitators, no new institutions modeling themselves after the WGU. It is not particularly well funded, nor has it established a market niche for itself. Most people do not even understand what it does, how it does it, or why a student would want it.

Still, the WGU has had a psychological impact on the academy. Despite being in its infancy, it is nonetheless seen by many as having the potential, for good or for ill, to set the future direction of higher education. There are several reasons one could cite for this perception. First, it has the bipartisan political support of eighteen governors -- from seventeen states and one territory -- giving the WGU unparalleled visibility in the public policy realm. Second, the corporate world has responded with enthusiasm to the idea, donating time and money to aid in its development. Third, its application to become an accredited institution is being considered jointly by four regional accreditation commissions -- an unprecedented action. Fourth, it is collaborating with faculty members and administrators at institutions from the midwest to the middle of the Pacific on the creation and distribution of learning materials to meet WGU academic requirements.

Fifth, it is frequently referred to as the "most ambitious" distance learning initiative in the United States (e.g., Noble, 1998). And finally, as Ted Marchese phrased it, when considering the new competitors facing higher education, "the scare words of choice are Western Governors University" (1998).

There is little doubt that the WGU has made an impact on the American higher education landscape. The institution has been featured in numerous newspapers, journals, and policy reports as an example of innovation and change in higher education (e.g., American Association of University Professors, 1997; Johnstone & Tilson, 1997; Mendels, 1998). It has received consistent coverage from the Chronicle of Higher Education (e.g., Blumenstyk, 1998). All of the major higher education associations in Washington have had presentations on the WGU given at their national meetings (Interviews). The WGU was specifically mentioned in discussions leading up to the recent reauthorization of the Higher Education Act as the kind of institution the Department of Education was interested in supporting (Interviews). All of this was happening, too, before the WGU had even opened.

The WGU has caught the attention of politicians, business executives, academics, accreditors, and technology advocates, not so much for what it has done, but for what it is capable of doing. It is capable of changing higher education. However, whether the WGU represents a radical change or a moderate alternative for higher education is, mostly because of the institution's newness, open to question. The 'Radical WGU' offers a revolutionary model that challenges the status quo. The 'Moderate WGU' suggests an innovative institution that will establish itself in collaborative coexistence with traditional colleges and universities. The "real WGU," as its founders would say, could support

either hypothesis (Interviews).

Instead of focusing on the institution itself, however, the image of the WGU as a force for changing higher education should be considered. While the WGU is a real institution of higher education, the impact that it has already had on the academic environment is due mainly to its symbolic functions. The WGU reflects current issues and trends in American higher education, and the image that it presents -- radical, moderate, or something else -- has become an important metaphor for the responses that are possible in this new environment. These radical and moderate images are, in many ways, just as real as the institution itself. Labeled the Radical WGU and the Moderate WGU to highlight the psychological power of the WGU as a symbol of change, they are true descriptions of the institution as it is often perceived -- the symbolic future of higher education (Interviews).

The Radical WGU

The Radical WGU is an institution of higher education that has colleges and universities across the country nervously wondering how they will survive the changes it threatens to bring. It is a bold experiment in distance education with an impact that can be compared to that of the GI Bill (Western Governors Association, 1996e). The Radical WGU intends be a “break-the-mold approach to higher education” (Western Governors University, 1997c) through a unique degree structure that combines the educational offerings of colleges, universities, and non-traditional institutions into a single competency-based program. The Radical WGU rejects tradition in favor of a whole new organization for postsecondary education.

A virtual university

As a virtual university, the Radical WGU demonstrates that colleges and universities do not need campuses to be effective. Technology can bring the world of knowledge to the student. Telecommunications can instantly connect scholars in any subject with the learner, and productive collaborations can be conducted over a network. Some students, particularly the traditionally-aged students direct from high school, will still choose a residential campus experience primarily for its socializing aspects. But many students -- the older adults, the part-timers, the lifelong learners -- will attend the virtual university from the convenience of their home computer. Peter Drucker has put it bluntly: "The future is outside the traditional campus, outside the classroom. Distance learning is coming on fast" (cited in Gubernick & Ebeling, 1997). The Radical WGU is one of the first institutions of higher education to completely give up the campus and the classroom. As a University that has no fear regarding technology, no resistance from faculty or students, and no outdated infrastructure to renovate, the Radical WGU presents a picture of what Drucker's future holds.

Limited faculty role

The Radical WGU also limits the need for faculty as an integral part of the university. Much instruction can be automated through the use of interactive programs and self-guided tutorials. Skillfully executed lectures from academic stars can be produced on video tape and distributed as part of a instructional package, allowing all students to have access to the best teachers. In the Radical WGU, committees of subject matter experts determine the curricular outcomes to be measured through competency assessments, and contract with other organizations to provide the necessary instructional

materials. The individual faculty member becomes "redundant," in David Noble's (1998) critical view, calling to mind the Kurt Vonnegut novel, Player Piano (1952). Once the skill is captured on tape in that story, there is no longer any need for a real person to continue the performance. The Radical WGU brings the player piano to higher education.

Low cost education

Because there is no need to invest resources in a campus or in the faculty, the cost of providing education is greatly reduced. A course, once designed, can be delivered to 10,000 students as easily as ten (Noam, 1995). And the institution does not need parking spaces, classrooms, heating or air conditioning in order to be effective. The Radical WGU suggests a new financial model for higher education, one in which economies of scale are the dominant function, and 'brick and mortar' considerations have little meaning. According to its supporters, the Radical WGU can make college more affordable for students, as well as provide a cost-effective way for states to meet the increasing demand for postsecondary education. Education can be provided to students, "whenever, wherever, and however they desire it," writes the former President of the University of Michigan, James Duderstadt (1999). "And at a cost they can afford." The Radical WGU completes society's long-anticipated movement from mass to universal education, at last surmounting the financial barriers which have stymied planners for decades (e.g., Trow, 1973).

Focused on marketable skills

The primary reason students attend college is to get a better job (Astin, Parrot, Korn, & Sax, 1997). The Radical WGU provides competency-based credentials for these

students, designed with industry assistance, which focus on marketable skills. These new degrees are presumed to be more valuable to the employer because the level at which the student can actually apply knowledge is verified and certified. The exact skills which are needed to perform successfully on the job are assessed as part of the curriculum. According to the Radical WGU, the student does not waste time learning what he or she already knows or will never use. Following from this perspective, then, esoteric subjects taught by ivory tower academics with no connection to the real world would have no place in the Radical WGU. Rather than supplying industry with graduates who meet some internally generated definition of an educated person, the job of this institution is to meet the demand for a skilled workforce. One of the founding governors of the Radical WGU described the difference for traditional higher education in this way: "We have replaced the tyranny of supply," he said, "with the democracy of demand" (Interviews).

Politically unstoppable

The power of the governors backing the Radical WGU creates an institution that cannot be ignored by the higher education establishment. Any rule, from financial aid eligibility to accreditation, which might prevent the Radical WGU from operating will need to be changed. The governors have no affinity for the traditions and structures of traditional academic decision-making. Policies which protect the status quo and stifle innovation will be legislated out of existence, or through the executive's power of the purse, they will wither from lack of fiscal support. Colleges and universities will not be able to oppose the governors' agenda embodied in the Radical WGU. The creation of this institution was a not-so-subtle warning that the governors would not be stopped in their efforts to break down the barriers blocking reform.

These features of the Radical WGU -- a virtual university with a limited role for faculty, providing a low-cost education that is focused on marketable skills, being pushed by politicians -- depict an institution that is deeply threatening to traditional higher education. At the same time, however, it represents an agenda for change that resonates with certain stakeholders in the academic enterprise. Think of it as higher education's version of the Matt Drudge effect. Drudge, the online purveyor of political rumor and insider gossip, makes no apologies for breaking the rules of traditional reporting. He is seeking another audience, however, and is using technology to provide that audience with the information they want. In doing so, Drudge forces the news-gathering establishment to take notice. The Radical WGU takes a similar stand with respect to the higher education establishment and, like Drudge, has forced existing institutions to pay attention to what it is doing.

The Moderate WGU

The Moderate WGU, as an alternative image of the institution, is not meant to threaten traditional higher education. It simply provides another option which some students may want to consider. Most of the activities of the Moderate WGU, in fact, are directed towards supporting the distance education activities in which traditional colleges and universities are already engaged (Interviews). Its broader mission is to provide access to high-quality education in a student-centered environment. In that respect, the Moderate WGU is an institution of higher education much like any other. The Moderate WGU accepts and values the traditional model for higher education. It offers, however, what many see as a few valuable improvements on tradition.

Increasing Access to Education

The campus is not irrelevant to higher education. It serves an invaluable role in the American system, and students of all kinds will continue to receive their education through face-to-face, campus-based instruction. However, some students, particularly in rural areas in the West, do not have convenient access to a campus. Other students cannot take the time from work and family obligations to attend a regular class. Still others, traditionally enrolled in college, may choose to take a distance education course because of scheduling difficulties with class sections offered on their campus. The Moderate WGU is not meant to replace traditional colleges or universities, or render campus facilities useless. It simply uses technology as a tool to allow more access to education for individuals who cannot get what they need through the current system. The Moderate WGU is, for these students, providing an optional educational experience where their choices were limited before. As one educator commented on hearing about the Moderate WGU: “Anytime people have more choices, I believe that’s good” (Interviews).

Partner with traditional institutions and their faculty

The Moderate WGU is a partner in the educational process, providing a way for colleges and universities to meet the educational needs of their students. The vast majority of its activities involve “brokering” the courses and programs of traditional colleges and universities -- providing access to the combined educational offerings of institutions across the West (Interviews). If a program is offered anywhere, it can be made available to the enrolled students of any college or university. The faculty who design and teach these courses can reach more students. Specialties can be offered where there isn’t a critical mass of students locally. And, contrary to the player-piano image of

the video-taped professor, the Moderate WGU requires faculty to be directly involved in every course listed in its catalog (Western Governors University, 1998c). In addition, the Moderate WGU employs academic advisors, all of whom have appropriate academic credentials, to work closely with individual students and ensure their academic progress (Interviews). While they are not faculty in the traditional sense, the advisors nonetheless play an important faculty role. As with any institution of higher education, instruction is important to the success of the Moderate WGU. Just as the Moderate WGU is not going to replace the campus, there should be no worries about the WGU eliminating the faculty role.

High quality, scaleable education

The Moderate WGU is all about quality, and as one member of the accreditation committee for the institution put it: "Quality is never cheap" (Interviews). However, with the scale possible through sharing resources and partnering with various institutions, money will be more efficiently spent and, in the long run, more students will be able to be served without an exponential increase in costs. Still, the Moderate WGU is not designed to reduce state support for higher education. It supports the goals of "cost containment, not cost avoidance" in the phrasing of a Trustee of the Moderate WGU (Interviews). The expense of developing one high-quality distance education course can be prohibitive. The Moderate WGU provides a framework for the cost to be spread out over multiple institutions. This allows colleges and universities to focus on creating the best course possible, rather than developing a cheaper class that fits the constraints of a limited budget. Granted, the scale necessary for such a system to be effective does not yet exist in the United States, nor is it anticipated for some years to come. But worldwide

there are other institutions -- “Mega-Universities” to use Sir John Daniel’s (1996) term -- which have demonstrated the model of high-quality, scaleable education, and the leaders of the Moderate WGU have made a long-term commitment to achieve an American version of this goal.

Focused on student learning

For the Moderate WGU, student learning is the only outcome that matters. What a student has learned is more important than how or where the student gained the knowledge. Learning math in the Moderate WGU does not necessarily require sitting in a math class for 15 weeks. Some students will be able to study independently or have the opportunity through work experience to learn the equivalent material. Governor Romer made the case for the Moderate WGU this way: “People are learning all over America in [places] that are not related to an educational institution. And we have to find a way to allocate public policy and resources to encourage that and recognize that” (Western Governors Association, 1995b). While this perspective may be disorienting to traditional higher education, such a focus on student learning fits within larger trends in academia (e.g., American Association for Higher Education, 1998). The Moderate WGU simply expands the notion of assessing student learning to include all learning, wherever it occurs. The question as to whether its credentials are equivalent to traditional credit-based degrees can only be answered with experience. Perhaps the WGU model will result in a new kind of certificate of learning, similar to the establishment of the Bachelor of Science degree during the curricular adjustments of the 19th century (Rudolph, 1993). The Moderate WGU, however, is not attempting to replace all degrees, only offer an alternative credential for those areas that might benefit from or need a competency-based

approach (Interviews).

Plays by the same rules

The governors who founded the Moderate WGU are aware that their status gives the institution prominence. But they are not asking for special treatment. The rules for accreditation, for example, were set by the accreditors, not dictated by the Moderate WGU. Policies for financial aid eligibility were changed not because the institution demanded a response from the Department of Education, but because Department officials and members of Congress independently recognized the limitations of existing regulations (Interviews). While the Moderate WGU does encounter rules and policies that hinder its ability to operate, the institution follows the established regulations and, like any other institution, works to effect changes which are more amenable to its preferences. Sometimes the Moderate WGU has been successful -- for example, in gaining eligibility for accreditation -- and sometimes it has not -- for instance, rules with respect to physical presence in the states. But in no case will the institution run roughshod over existing procedures by asserting gubernatorial privilege. The Moderate WGU is just asking to be given the chance to prove itself, playing by the same rules as any other college or university.

The features of the Moderate WGU describe an institution that, in partnership with other colleges and universities, is helping higher education meet its goals of providing affordable access to educational opportunities. “Think of your Western Governors University as a real, flesh and blood, academic community,” suggested Sir John Daniel (1998) in a speech which reflected the Moderate WGU perspective. “Universities have been around for 1000 years, inspired by the timeless academic ideal

that knowledge is important. Aim for evolution, not revolution, from that proud tradition." The WGU is a different sort of institution to be sure, but with such traditional goals, it ought to be able to go about its business without causing much consternation. Any change will be gradual, instituted by consensus, and with due respect for the millennial history of successful educational practice.

The Symbolic WGU

The Radical WGU and the Moderate WGU provide dramatically different views of the institution and its potential impact on higher education. The Radical WGU suggests an institutional juggernaut, where campuses and faculty are practically unnecessary, marketable skills are primary, and costs can be reduced substantially. The Moderate WGU portrays an institution that plays within the bounds of traditional higher education, with the focus on access, student learning, and the provision of high-quality education at a reasonable cost. But the fact remains that neither of these visions truly represents the real WGU -- the institution with a couple dozen employees, maybe a few hundred students, an uncertain revenue stream, and a uniquely ambitious academic agenda. Whether its effects will be radical or moderate is a question only the future will decide.

There is, however, a third perspective -- the Symbolic WGU -- which provides a different way of talking about the institution. Rather than attempting to describe the real WGU, the Symbolic WGU presents a framework for interpreting the institution's real impact on higher education. The WGU has become a metaphorical description of the more general threat to traditional higher education posed by a changing environment. The

institution symbolizes changes that are already occurring, or will soon occur, which promise to have a dramatic impact on existing colleges and universities. The WGU is seen as being at the center of those changes (Interviews), regardless of whether the real institution is actually causing any of them.

This explains why the real WGU is almost beside the point when it comes to understanding the institution's impact on American higher education. The Radical WGU and the Moderate WGU are actually two versions of another institution -- the Symbolic WGU -- which is asking colleges and universities some fundamental questions about how higher education is organized in this country. The WGU has made an impact because it embodies the important issues facing colleges and universities: 1) intense criticism of institutions of higher education, especially by government officials; 2) a funding crisis which looks to be permanent; 3) a demographic shift which shows student populations simultaneously growing and changing; and 4) the growing role of technology in the teaching/learning process. These issues make up what some have called the new realities of the higher education environment -- or "harsh realities" to use Philip Altbach's more pessimistic phrase (1999).

Higher education is facing a changing environment. Old assumptions no longer seem valid and colleges and universities are being asked to adapt. The recent wave of criticism has continued unabated since William Bennett released To Reclaim a Legacy in 1984. Changes in funding patterns, according to Arthur Levine (1997a), have signaled higher education's move from a growth industry to a mature industry. The traditional undergraduate student is a myth -- fewer than one in six college students are 18 to 22 years old, attending full-time at a four-year residential campus (Levine & Cureton, 1998).

And the availability and power of technology has exploded in the 1990s, increasing the pressure on colleges and universities to use it as an educational tool (VanDusen, 1997). The academic community has generally been slow to respond to these trends, leaving the door open for a range of new competitors in an emerging higher education marketplace (Marchese, 1998).

The WGU symbolizes the new competition. Colleges and universities no longer have a monopoly on higher education. Corporate universities, for-profit institutions and venture capital supported initiatives are now competing with traditional higher education in what was once a sleepy industry (Marchese, 1998). The governors, however, give the WGU the visibility that other institutions have lacked. And the ambition of its academic agenda vividly raises the prospect of non-traditional providers directly competing in the core markets served by existing colleges and universities. For institutions that have grown comfortable in their insularity, the WGU represents a threat.

The more entrepreneurial colleges and universities, however, along with their for-profit brethren, stand ready to take advantage of the new "academic common market" suggested by the WGU (Interviews). For these institutions, the WGU symbolizes a breakthrough event -- the "10,000 pound gorilla" that demands attention and forces change -- creating an environment where non-traditional contributions to education can finally move from the periphery and occupy the center. This is just the opportunity for which they have been waiting (Interviews).

A similar symbolic identification occurs with the WGU regarding each of the trends facing colleges and universities -- the use of technology in higher education, changing demographics, fiscal constraints, and criticism of traditional institutions. The

Symbolic WGU is an institution which places technology at the forefront of its mission, claiming that it can be a powerful tool for eliminating the barriers of place and time in providing an educational experience to students. It is an institution which has responded to the calls for lifelong learning and the needs of knowledge workers in the new economy, and offers to all an affordable, first-class education. The states will not go broke attempting to fund new institutions with ever larger enrollments. And the critics of higher education finally get what they have been looking for: the power of the faculty is limited, antiquated polices are challenged, and the economic and educational needs of society are addressed. Whether the WGU symbolizes triumph or tragedy depends on the rhetorical needs of the observer, but the institution will always be the singular embodiment of the new higher education environment. The words 'Western Governors University' become scary to traditionalists, thrilling to reformers, and confusing to the rank and file because the phrase no longer refers to anything necessarily real. Those three words more often indicate an idea, a concept, an issue, even a philosophy, not the actual institution.

A report on distance learning produced by the American Association of University Professors (AAUP) in 1997, provides a typical instance of how the WGU takes on symbolic meaning. There are hundreds of institutions in the United States engaged in distance education, serving thousands of students. The AAUP, however, only mentioned two by name -- the WGU and the University of Phoenix[3] -- in making the

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[3] The University of Phoenix actually makes another interesting case study of an institution which has taken on symbolic meaning in higher education. At the time of AAUP report (1997), almost all of the University of Phoenix's students were studying in typical classroom environments, not on-line or through distance education. Phoenix and the WGU are often linked in discussions regarding the current state of American higher

point that this was a new trend with which faculty needed to be concerned. At the time the AAUP report came out, the WGU had eight employees, no approved curriculum or competency assessments, no students, and no academic catalog. A decision regarding the institution's eligibility for accreditation had been postponed six months because it was not ready to meet the requirements (Interviews). The WGU did not even have its own web page -- the Western Governors Association was still hosting a site which described the initiative. Yet the AAUP used the WGU to represent the larger trend of distance learning in American higher education. While the WGU would deserve mention as an innovative -- and possibly disturbing -- way of approaching the topic, it was far from representative then, or even now, of the efforts of most colleges and universities in this country. As a symbol of change, however, it was right on target.

Other examples abound (e.g., Ashworth, 1996; Farrington, 1999; Noble, 1998; O'Banion, 1997), all written, if not published, before the WGU had enrolled a single student. These authors describe the WGU in ways that are often inaccurate, but always representative of the trend at issue. Farrington (1999), for example, refers to the WGU as one of the growing numbers of for-profit virtual universities that are successfully vying for students currently served by traditional institutions. O'Banion (1997) presents the WGU as a joint venture between governors and a publishing company to make his point that if higher education does not change, it will be invaded by new competitors ready to take over the market. Perhaps it is a quibble to correct these accounts by suggesting that the WGU is neither a for-profit initiative nor substantially a public-private collaboration

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education (Interviews), even though they are rather different institutions. Both, however, have come to symbolize change and serve collectively as the appropriate shorthand for a wide range of issues.

with a publishing company. The larger issues raised by the authors are valid -- there are corporations interested in tapping the higher education market as a profit-making venture, and publishing companies are looking for opportunities to move beyond simply selling textbooks for others to employ. The WGU, while not actually being an instance of these phenomena, symbolizes them perfectly.

These misrepresentations of the WGU may be explained by claiming a lack of accurate information about the institution. But this does not seem credible. The WGU founders, developers, and staff have been presenting updates around the country almost non-stop since the institution was formally proposed in 1996 -- in the beginning at the rate of more than one a week (Western Governors University, 1996). And the WGU web site has always provided extensive background on the organization and development of the institution. The inaccurate, yet symbolic, use of the WGU continued unabated, even as the staff tried to address the "myths," that had evolved around their project (Interviews). The opening slide of a standard informational presentation began, "Sometimes reputation precedes reality" (e.g., Livingston, 1997b). One WGU staff member stated that a large portion of his job was devoted to "expectation management" (Interviews). As much as those involved in the actual development of the institution might want to describe the "real WGU," they found repeatedly that it was quite difficult to do so. One memo written in the spring of 1997, noted "how far we have to go in overcoming the 'perception gap' surrounding what the WGU is and is not," and suggested that the staff "continue communicating the basics of organizational mission, strategy, and structure in as many places as possible" (Ewell, 1997d). While the reasons for the "perception gap" also involved the staff's still developing understanding of the

new University's mission and purpose, as well as the complicated structure of the institution and the language chosen to describe it (Kinser, 1998), the symbolic nature of the WGU should accept much of the responsibility.

This is not to say that all symbolic uses of the WGU were inappropriate reflections of the real institution. Some accurately placed the WGU in the context of the larger trends facing higher education and pointed out how its innovative structure was a fundamental challenge to traditional frameworks (e.g., Ewell, 1999; McGuinness, 1999). But the importance of the WGU should not be limited by rigorous referral to the real institution. The danger of such restrictions is evidenced by the response of many academics after learning that the WGU had enrolled few students during its first months of operation (Chronicle of Higher Education, 1998b). Skeptics easily dismissed the institution as insignificant based on this new piece of information (Interviews). The new realities facing higher education, however, still exist. The message is still important, even if the messenger is out of breath.

Changing Higher Education

The importance of the WGU should be understood symbolically -- as a metaphor that describes the higher education environment more than it reflects the existence of an actual organizational entity. As one person close to the WGU put it, "Pay no attention to the man behind the curtain" (Interviews). Like the Wizard of Oz, the WGU has provided the means for various individuals both to find the solution to the perceived problems of higher education, as well as to have an entity to blame during a time when the winds of change seem to be blowing higher education off course. The WGU is not, however,

simply using the Wizard's smoke and levers to create an impressive and terrifying image that is ultimately a fiction. There is a historical WGU at the basis of all the symbolism that is certainly not irrelevant, though this real institution does not need to survive in its current form for it to continue having a symbolic impact. While this was a frustrating thought for many of those deeply involved in developing the WGU, there was little doubt that the significance of what they were doing had implications beyond a single institution (Interviews).

The descriptions of the Radical WGU and the Moderate WGU show how the WGU could change higher education. As variations of the Symbolic WGU, they create an image of an institution that is responding to the new realities facing higher education. But the Symbolic WGU also makes it possible to think about higher education in different ways and still consider the possibilities as realistic alternatives. To the Radical and Moderate WGU, one could add the Marginal WGU, which operates on the fringes of the system and attracts students which traditional higher education has elected not to serve. The Blended WGU is an option which suggests a mixed system, with institutions adopting portions of the WGU model while maintaining their traditional organization. The Charter WGU is another possibility, stimulating reform across the existing system much like a charter school would in public elementary and secondary education. Or one could define the World Wide WGU, which expands access to the famous American higher education system literally to anyone, anywhere in the world. The real WGU could encompass any of these options without much of a struggle, and in fact all have been described at one time or another by those actually creating the institution (Interviews). As a symbol of change in higher education, the WGU is eminently malleable.

In founding the WGU, the governors did more than create a new university. They really were asking people to consider new ways of delivering course content, new methods of assessing learning, and new roles for faculty in the educational process. Once those questions were asked, the doors were opened for people to consider the answers. The possibility of change became the reality while the WGU was still little more than a statement of ideals. Whether the WGU itself actually adequately answers all of these questions is beside the point. The Symbolic WGU shows the way.

Conclusion

The WGU represents a new way of thinking about the future of higher education. But making predictions at this stage is a gamble. There is little way of knowing how the WGU experiment will turn out, nor is there much information about how pervasive its influence will be on other institutions -- both traditional and non-traditional -- that consider themselves in the business of education. But much of what is important about the WGU does not rely on the institution itself being successful. It is enough that it could demonstrate the model as being a legitimate one for an institution of higher education to employ. The viability of the various components of the WGU, on the other hand, is an empirical question that could take decades of failure before an affirmative answer is recorded. The curricular reforms attempted at Harvard in the 1820s provides an historical example. It took the presidency of Charles Eliot, sixty years later, before the elective course of study became a workable alternative to the prescriptions of the colonial college (Rudolph, 1993). A rejected WGU could be an institution before its time as easily as a reform that failed.

Of course, the WGU may not fail and it may establish itself as a permanent fixture on the higher education landscape. In this case the question becomes an assessment of the extent of the WGU's influence on other institutions. In the years after the Civil War, the founding of several new universities set the stage for the system of higher education we know to this day. Institutions such as Cornell and Johns Hopkins, along with a revamped Harvard, provided a model that other institutions were destined to follow (Veysey, 1965). To determine whether the WGU would be that sort of university, able to influence the entire industry of postsecondary education, would require an investigation far beyond that conducted for this volume -- and it would still likely fall short.

However, the fact of the matter is that the WGU represents a new model for postsecondary education, with implications that should not be ignored. It challenges the received wisdom regarding how colleges and universities should be organized, how faculty should spend their time, and how learning should be rewarded. Even though there is no way of knowing whether what is being described here will ultimately represent the future of higher education, as a representative of the kinds of change that may come to higher education, the WGU is a significant force. Considering the trends facing higher education described in Chapter 1, it is easy to see how institutions like the WGU could flourish. The governors, extremely critical of current practice in the educational institutions of their states, founded the WGU out of frustration and with a desire to cause colleges and universities to change. The institution targets the growing non-traditional student population, and uses technology to its fullest extent. And, while economies of scale are years away, the financial model of the WGU has already been proven by large institutions in other countries -- particularly the Open University in the United Kingdom

(Daniel, 1996). Regardless of its future success or failure, the WGU has certainly caused many people to consider what that future might in fact be. It demonstrates that on the other side of higher education's looking glass, almost anything is possible.

This is not a new place for colleges and universities to be. Looking at a changing environment and wondering where it will lead has been a recurring theme in American higher education. In his 1871 inauguration speech, Noah Porter of Yale -- certainly no cheerleader for change -- took stock of the post-Civil War academic environment:

> Never, perhaps, did this subject occupy the thoughts of so many persons and occupy them so earnestly. It certainly never excited more active controversy, or provoked more various or confident criticism, or was subjected to a greater variety of experiments than with us these passing years. The remark is not infrequently made that college and university education are not merely agitated by reforms; they are rather convulsed by a revolution, -- so unsettled are the minds of many who control public opinion, so sharp is the criticism of real or imagined defects in the old methods and studies, and so determined is the demand for sweeping and fundamental change. (quoted in Veysey, 1965, p. 1)

Porter was writing on the cusp of the rise of the American university, a transformation of higher education that would soon include even his own institution. Perhaps a story similar to the WGU's might have been told to Porter and his colleagues about Cornell University, or about Johns Hopkins a few years later. From this vantage point, it is impossible to project the current "variety of experiments," as Porter called them in his era, too far into the future. It gets blurry on the other side of the looking glass.

It is important to note, however, that higher education has not come to the end of history. The changes that the WGU represents have, in some ways, always been a part of the world of colleges and universities. One executive director of a higher education association, herself rather critical of the WGU, nonetheless took this historical perspective:

> Higher education is always evolving, and it has evolved dramatically in this century and equally dramatically in the previous century, and it must continue to change and evolve. And it will, and it will do so in a somewhat uncertain dialectic with the larger society. (Interviews).

The choice is not between stasis and upheaval. Rather it is among a variety of experiments with alternatives that will range from the bizarre to the backward. The WGU is just one look at the beginning of a long line of institutional responses to the new realities facing higher education. Changes may come faster or slower, but it is certain that they will come, just as they always have in the past.

Perhaps the WGU will end up a nearly forgotten footnote from the turmoil at the end of a century. But right now, as a changing world becomes the new reality for higher education, the WGU has come to represent one glimpse of how different higher education could be. As Alice imagined, the room on the other side of the looking-glass seemed identical to the room she was in -- at least as much as she could see. But on the other side, she found it to be amazingly different. When seen with eyes accustomed to the looking-glass world, higher education, too, may become something very different. But without such enhanced vision, these potential futures for higher education become, in the words of one critic, “too much wishful thinking” (Interviews). The challenge is to see the options and to consider the implications of change without fear of the unknown. After learning to play under the changing rules in the world she discovered, Alice was granted her wish and made a queen. American higher education, if it can follow Alice through the looking glass and learn a new set of rules, may find the result to be similarly worth the effort.

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[4] A mistake in the header of this memorandum indicated it was written on January 9th. Based on the document's content, it was probably written on February 9.

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Appendix A

Interview Consent Form

This interview is being conducted for a case study of the Western Governors University. It will use a standard interview protocol and will pose no risk, physical or psychological, to the participant. The interview will ask the respondent to provide personal opinions about the Western Governors University and about higher education in general. No other personal information will be sought. The name of the respondent will not be used in written reports based on this interview without permission.

The investigator will answer any questions the respondent may have about this interview and its procedures. The respondent is free to withdraw consent and to discontinue participation in this interview at any time. Concerns or complaints about the interview or the conduct of the investigator may be addressed to the Institutional Review Committee of Teachers College, Columbia University.

I understand the description of this interview
given above and I agree to participate.

_____ _____

Respondent's Signature Date

I agree to conduct this interview according
to the description given above.

_____ _____

Kevin Kinser Date

Appendix B

Tables 1 through 5 and Figure 1

Table 1

Status of the 56 Interviewees

Status	# of people
Accreditors	4
Governors and staff	8
Higher Education Organizations	17
Pilot Providers	10
WGU design team, staff, and consultants	21
WGU Governing and Advisory Board	5

Note. Several interviewees fit into more than one category.

Table 2

Interview Protocol for Accreditors (A); Board of Trustees/National Advisory Board (B); Governors/Governors' Staff (G); Higher Education Representatives (H); Pilot Institution Representatives (P); and WGU Staff Members, Design Team and Consultants (W).

Question	A	B	G	H	P	W
Describe the first discussions about the WGU at the 1995 WGA meeting in Park Lake, UT.			√			
Why did your state decide to participate?			√		√	
To what extent is improving access a factor in the development of the WGU?	√	√	√	√	√	√
To what extent is providing education at less cost a factor in the development of the WGU?	√	√	√	√	√	√
To what extent is developing a competency-based learning system a factor in the development of the WGU?	√	√	√	√	√	√
How much were you involved with higher education issues before the WGU?		√	√			√
How political has the development of the WGU been?	√	√	√		√	√
What difficulties have you encountered in developing/working with the WGU?	√	√	√		√	√
Describe your earliest experience with/knowledge of the WGU.	√	√		√		√
How did you become involved with the WGU?		√			√	√
Describe your role within the WGU now.	√	√	√		√	√
Why do you think the WGU began when it did?	√	√	√	√	√	√
What is the most important/critical aspect of the WGU to you?	√	√	√	√	√	√
What impact do you think the WGU will have on higher education as a whole?	√	√	√	√	√	√
From your perspective, what has been the response of higher education to the WGU?	√	√	√	√	√	√
What do you expect to happen now?	√	√	√	√	√	√
How is the WGU different from traditional higher education?	√	√	√	√	√	√
What do you think about similar efforts, such as California Virtual University, and Southern Regional Electronic Campus?	√	√	√	√	√	√

(table continues)

Question	A	B	G	H	P	W
Describe the accreditation process so far.	√					√
Does traditional higher education need to change? Why or why not? How?	√	√	√	√	√	√
What do you think about the WGU becoming an accredited institution?	√	√	√	√	√	√
What issues are raised by WGU's application for accreditation?	√			√		√
What do you think about the use of technology and higher education?	√			√	√	√
What kinds of students do you think make up the market for the WGU?	√	√	√	√	√	√
To what extent is the WGU competing with traditional higher education?		√	√	√	√	√
To what extent is the WGU offering an alternative to traditional higher education?	√	√		√	√	√
To what extent does the WGU solve the problem of providing post-secondary education for the boom of students projected for the next decade?		√	√	√	√	√
Was it difficult to coordinate efforts between all the different individuals and organizations involved in the development process?		√	√		√	√
How did the physical distance separating those planning the WGU affect the development process?			√			√
Compared to what was described in the earliest vision statement, how different is the WGU as it current exists? Why did these changes occur?		√	√			√
How would you know if the WGU has been successful at what it set out to do?	√	√	√	√	√	√

Note. See Table 1 for number of interviewees in each category.

Table 3

InterRegional Eligibility Requirements

Title		Requirement Text
#1	Authority	The institution is authorized to operate as an educational institution and award degrees by an appropriate governmental organization or agency as required by each of the jurisdictions or regions in which it operates.
#2	Mission	The institution's mission is clearly defined and adopted by its governing board consistent with its legal authorization, and is appropriate to a degree-granting institution of higher education.
#3	Governing Board	The institution has a functioning governing board responsible for the quality and integrity of the institution and for ensuring that the institution's mission is being carried out. Its membership is sufficient in size and composition to fulfill all board responsibilities. The governing board is an independent policy-making body, capable of reflecting constituent and public interest in board activities and decisions. A majority of the board members have no contractual, employment, family or personal financial interest in the institution.
#4	Chief Executive Officer	The institution has a chief executive officer who is appointed by the governing board and whose primary responsibility is to the institution. The chief executive officer may not serve as the chair of the institution's governing board.
#5	Administrativ e Capacity	The institution provides the administrative services necessary to support its mission and purpose.
#6	Operational Status	By the time it seeks candidacy, the institution is operational with students actively pursuing its degree programs.
#7	Degrees	A substantial portion of the institution's educational programs lead to degrees, and a significant proportion of its students are enrolled in them.[a]
#8	Educational Programs	The institution's degree programs are congruent with its mission, are based on recognized field(s) of study, are of sufficient content and length, and are conducted at levels of quality and rigor appropriate to the degree offered.
#9	Portability Of Learning	The institution adopts and publishes clearly stated policies and procedures regarding portability of achieved learning.[b]
#10	Educational Objectives	The institution defines and publishes for each program the program's educational objectives for the students.

Title	Requirement Text
	(table continues)
#11 General Education	The institution defines and incorporates into all of its undergraduate degree programs a substantial component of general education designed to ensure breadth of knowledge and promote intellectual inquiry.
#12 Faculty	The institution provides a clear statement of faculty responsibilities including development and review of curriculum as well as assessment of learning.[c]
#13 Student Services	The institution provides for all of its students appropriate student services and development of programs consistent with student characteristics and its institutional mission.
#14 Admissions	The institution has adopted and adheres to admission policies consistent with its mission that specify the qualifications of students appropriate for its programs.
#15 Information And Learning Resources	The institution owns or otherwise provides access to sufficient information and learning resources and services to support its mission and all of its educational programs.
#16 Financial Resources And Accountability	The institution documents a funding base, financial resources, and plans for financial development adequate to support its mission and educational programs to assure financial stability. The institution regularly undergoes and makes available an external financial audit by a certified public accountant or an audit by an appropriate public audit agency.[d]
#17 Integrated Planning	The institution provides evidence of basic planning to achieve candidacy and ultimately accreditation which integrates plans for academic, personnel, information and learning resources, and financial development.[e]
#18 Institutional Evaluation	The institution engages in systematically evaluating how well and in what ways it is accomplishing its purposes, including assessment of student learning and documentation of institutional effectiveness.
#19 Public Information	The institution publishes in its catalog or other appropriate places accurate and current information that describes purposes and objectives, admission requirements and procedures, rules and regulations directly affecting students, programs and courses, degrees offered and the degree requirements, costs and refund policies, grievance procedures, academic credentials of faculty and administrators, and other items relative to attending the institution and withdrawing from it.
	(table continues)

Title	Requirement Text
#20 Relations With IRAC	The governing board provides assurance to IRAC that the institution adheres to the eligibility requirements, accreditation standards and policies of IRAC, describes itself in identical terms to all its accrediting agencies, communicates any changes in its accredited status, and agrees to disclose information required by IRAC to carry out its accrediting responsibilities.

Note. Table from Inter-Regional Accreditation Committee, 1998a. Footnotes from Regional Accreditation Committee, 1996.

[a] Revised. Original text read: "A substantial portion of the institution's educational offerings are programs that lead to degrees, and a significant proportion of its students are enrolled in them."

[b] Revised. Original text was titled "Academic credit" and read: "The institution awards academic credit or uses units based on credit hour equivalency."

[c] Revised. Original text read: "The institution has a core of qualified faculty with primary responsibility to the institution and sufficient in size to support all of the institution's educational programs."

[d] The two sentences of this requirement were originally separate items labeled "Financial resources" and "Financial accountability."

[e] This was a new requirement added by IRAC

Table 4

WGU Faculty Functions

"Traditional" Faculty Function	WGU Counterpart
Curriculum design/oversight	Program Councils
Instructional delivery	Educational providers, overseen by Educational Provider Review Council
Academic advising	WGU Advisor
Assessment of student performance	Assessment Council
Academic planning and coordination	Associate Academic Officers

Note. Adapted from National Center for Higher Education Management Systems, 1997d.

Table 5

Domains and subdomains for WGU's Associate of Applied Science (EMT)

Domain	Subdomain	#[a]
Applied Quantitative Reasoning Skills	Arithmetic/Algebraic Skills	13
	Statistical/Probability Skills	8
	Quantitative Problem-Solving Skills	5
	Quantitative Communication Skills	4
	Quantitative Technological Skills	6
Applied Language and Literacy Skills	Reading Skills	3
	Writing/Information-Recording	4
	Presentation-Related Skills	5
	Interpersonal Communications Skills	3
	Basic Information Retrieval Skills	5
Basic Work-Related Skills	Basic Observational Skills	2
	Learning from Role Models	2
	Monitoring and Evaluating Own Performance	5
	Personal Professional Qualities	4
	Completion of Tasks/Assignments to Client or Supervisor Specifications	4
	Tools and Techniques for Working with Others	7
	Personal and Organizational Responsibility and Ethics	11
	Learning Skills	3
Specific Applications of General Skills to Electronic Technology Settings	Electronics-Related Applied Quantitative Reasoning Skills	8
	Electronics-Related Applied Communication Skills	10
	Electronics-Related Applied Science and Technology Knowledge and Skills	4
	Electronics-Related Basic Manufacturing and Workplace Knowledge and Skills	7
Electronics Job-Related Competencies and Skills	Basic Knowledge of Electronics and Circuits	14
	Basic Electronics Skills	6
	System-Level Setup, Testing and Evaluation Skills	4
Distribution	Natural Sciences	[b]
	Social Sciences	[b]
	Humanities	[b]

Note. From Western Governors University, 1999b.
[a] Refers to the number of individual performance descriptions for each subdomain.
[b] The student must complete a one course-equivalent outcome examination.

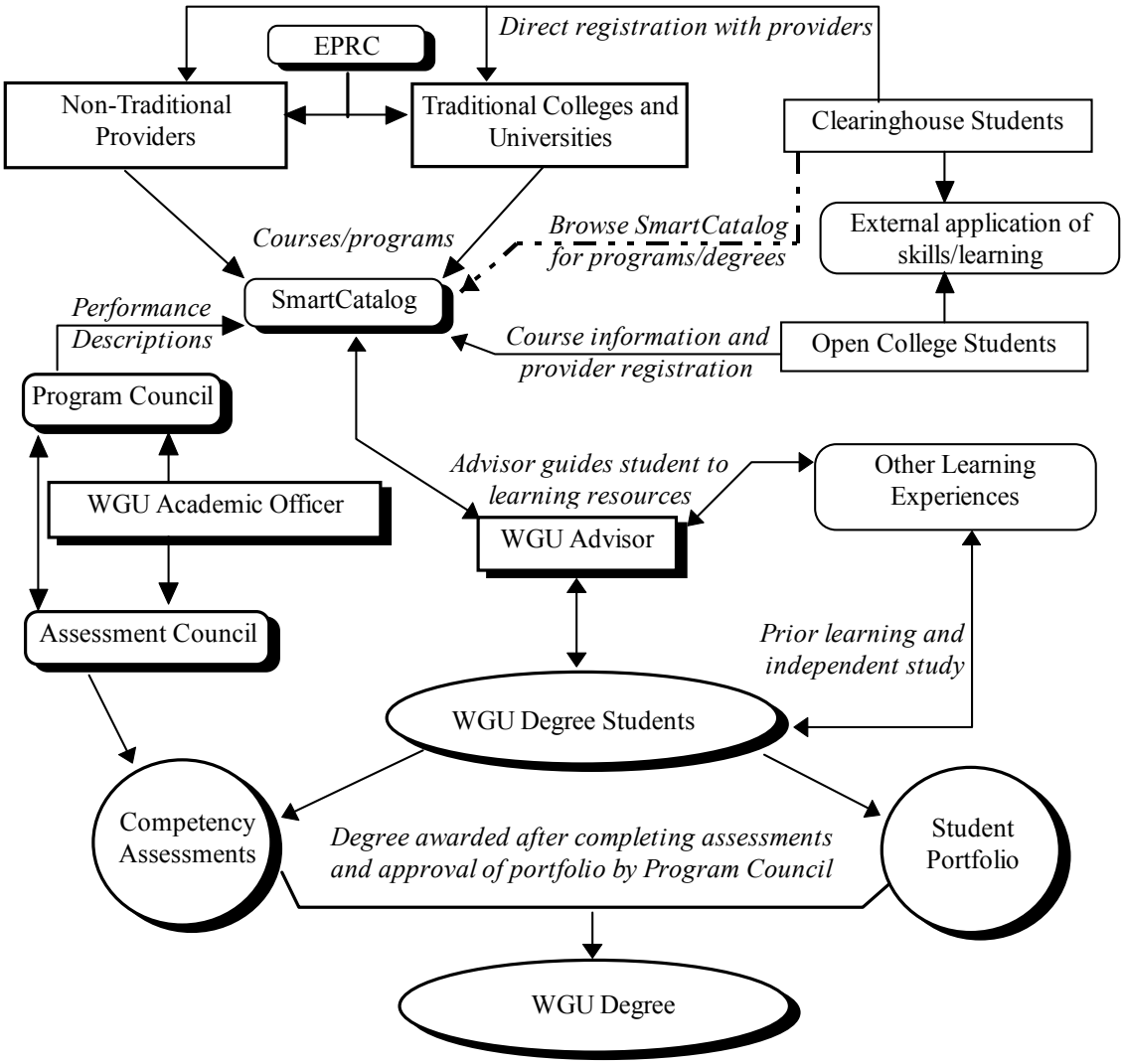

Figure 1: Model of WGU's educational activities. Shadowed items are under WGU administrative control.

Appendix C

Supporting Documents

The following is a list of documents which were gathered for this volume. They are cited here to give the reader a sense of the scope of materials collected and considered throughout the study, independent of their formal citation in the text. The assistance of the WGA and WGU staff and consultants in making the majority of these documents available is acknowledged with appreciation, particularly that of Marianne Boeke of the WGU, Anne Quinn Egan of the Office of the Governor of the State of Colorado, and Peter Ewell of NCHEMS.

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[5] A mistake in the header of this memorandum indicated it was written on January 9th. Based on the document's content, it was probably written on February 9.

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Appendix D

Competency Degree Description for the WGU Associate of Arts Degree

Domain: Mathematics and Quantitative Skills

Sub-domain: Numeric and Calculation Skills

- Identify and represent basic number patterns and systems:
    - natural, integer, rational, real, binary
    - decimal, fraction, percentage, scientific notation
- Set up and manipulate:
    - ratios, rates, proportions, percentages
    - ratios and proportions requiring conversions to same units
- Apply principles of proportions and proportional reasoning to make plausible estimates
- Determine the best economic value using such techniques such as unit-cost, percentage difference or visual comparison
- Describe and use:
    - calculation properties: addition, subtraction, multiplication, division, exponents, roots
    - mathematical operations: opposites, reciprocals, absolute values, exponents, roots, logarithms
- Calculate:
    - arithmetic and algebraic operations with whole and rational numbers
    - rate and percentage of change at a constant rate

- Diagnose errors in thinking in multi-step calculations

<u>Sub-domain: Functions and Algebra Skills</u>

- Find solutions
    - to problems with more than one unknown and/or non-linear function (linear, quadratic, logarithmic, trigonometric, radical, rational and exponential equations)
    - to equations or systems of equations with more than one unknown
    - to multiple-step, real world problems utilizing functions or algebraic methods
- Define and use variables, parameters, constants, and unknowns to set up functions and equations
- Identify, describe and use basic functions (linear, exponential, polynomial, periodic, power, rational, square and square root, cube and cube root)
- Use increasing and decreasing properties of functions (evaluation, inverses, slope, maxima and minima)
- Model actual situations, processes or number patterns in linear, exponential, or quadratic forms, and interpret these representations in terms of real situations
- Represent functional relationships with formulas, tables and graphs, and translate one form into another using technological tools
- Describe matrices and their use in solving systems of equations
- Identify and correct function and algebraic errors to solutions for applied problems

Sub-domain: Geometry and Measurement Skills

- Graph:
    - geometric curves and graphs of functions in commonly used coordinate systems
    - numbers on a number line, also deriving numbers from named coordinates
- Use deductive reasoning to justify hypotheses about properties of geometric figures
- Create models for actual situations, processes, or number patterns and interpret their significance to the situation
- Apply logic and geometric principles to arrive at real world solutions
- Describe and determine formulas for area, surface area, and volume
- Use proportions to solve problems for shapes, objects, and expansions and contractions of figures
- Apply scale and change of scale to visual representations (i.e., maps, figures, diagrams)
- Identify and correct errors in reasoning and application in applied geometric problems
- Describe the logic and applications of standard measurement (linear, weight, time, and derived measures such as ratios and unit conversions)

Sub-domain: Collegiate Statistical/Probability Skills

- Describe:
    - the roles of assumptions and uncertainty in making inferences

    - the application and limitations of widely-used sampling techniques
    - the properties and uses of normal distribution
    - the properties and uses of the Law of Large Numbers
- Use appropriate models and algorithms to estimate probabilities
- Critique statistically-based conclusions in the work of others, adjust data-based conclusions after learning new information about the data (for example, missing data)
- Work with data to:
    - collect, analyze, interpret and display single- and double-variable data using graphic formats, summary statistics, and correlations, regression lines, and regression coefficients
    - compare expected outcomes based on data from two or more real-world scenarios
    - develop tentative conclusions from data [that][6] test the plausibility with statistical methods
    - develop a design to test a hypothesis in a real-world setting, use statistical techniques to confirm or deny the hypothesis
- Characterize uncertainty using measures such as standard error (i.e., the Gallop poll)

<u>Sub-domain: Quantitative Problem-Solving Skills</u>

- Provide example that support a conjecture and samples that actually prove a conjecture

- Use multiple forms of reasoning: deductive, inductive, hypotheses, counter examples, indirect proof
- Identify standard methods for solving problems and limitations (such as knowing an average cannot be higher than the highest number in the problem, analogy, working backwards, and problem restatement)
- Locate and solve quantitative problems occurring in non-mathematical as well as mathematical contexts; formulate the calculation to be performed for multi-step operations
- Assess the plausibility of solutions and estimate downstream consequences of inaccurate or irrelevant solutions

Sub-domain: Quantitative Communication Skills

- Identify basic mathematical vocabulary and standard notation; use symbols and common conventions for graphing and data presentation
- Explain equations and calculated results for problems and real-world applications to others who may not be familiar with mathematical methods:
    - orally and in writing
    - through graphic representations
- Input, generate, and revise data tables and graphs using a spreadsheet program

Quantitative Technological Skills

- Use spreadsheets, databases, and simple computer programming tools to represent data, model situations, or perform calculations related to a problem

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[6] Brackets indicate a correction of a typographical error in the original document

- Describe the basic logic of computer applications for solving math-related problems
- Select and use appropriate technology (computer applications, graphing calculators):
    - for arithmetic and algebraic operations with whole and rational numbers
    - to represent functional and quantitative relationships as formulas, tables and graphs
    - to translate information from one format to another
    - to address non-routine, multi-step problems

Domain: Language and Communication Skills

Sub-domain: Collegiate Reading Skills

- Identify main ideas, details, cause-effect relationships, unsupported or contradictory claims, definitions from context; outline main ideas
- Follow written instructions effectively, and apply written information to solve a new problem
- Identify and describe specific strategies employed by the author in a text, and identify variances between intent and literal meaning
- An understanding of expressed points of view in the context of social, historical, cultural, and literary settings
- Compare and explain the clarity and usefulness of two documents

- Demonstrate the ability to form conceptual images from text, demonstrate an understanding of complex texts, and demonstrate recognition of other voices incorporated into one text
- Interpret and evaluate visually organized information
- Prepare a personal reading list from a wide variety of works, keep a reading journal, and create an annotated bibliography related to a particular subject or theme

Sub-domain: Descriptive Writing Skills

- Articulate a process for generating ideas, drafting and revising written communications
- Identify differences in style, detail, and grammar for different audiences
- Produce written communications that convey several points in a focused and clearly expressed fashion, are grammatically correct, use a variety of Standard English word choices and sentence structures, exhibit a variety of way[s] to express the same information through different structures, demonstrate improvements through the process of revision, and are drafted and revised with a word-processing program
- Produce a written summary, a written position or evaluation, a set of instructions
- Explain a given table or graphic in writing
- Articulate a process

Sub-domain: Critical and Analytical Writing Skills

- Describe and use a variety of strategies for presenting arguments

- Describe and use a variety of strategies for presenting interpretations of texts
- Produce logically-organized written positions that consider the audience, engage the reader, demonstrate analysis of support from published sources, and demonstrate citation ethics and skills
- Produce a written analysis of the strengths and weaknesses of a piece of one's own writing, explaining why given strategies were used, and how the strategies might change for a different audience

Sub-domain: Presentation-Related Skills

- Identify differences in style, level of detail, and usage for different audiences
- Adjust style, tone, length and level of detail to suit the needs of a particular audience
- Identify the strengths and weaknesses of various communication tools for different audiences including visual displays such flow charts, maps, and exploded diagrams
- As a Presentation Observer: Identify main ideas, the relationship of ideas, unsupported conclusions, summarize the main points, formulate, ask questions of a presenter, and create a written summary
- As a Presenter: In a clear and audible voice, deliver a presentation that is clearly organized, contains supporting evidence and appropriate media, anticipates audience reactions or possible questions, and respond to questions afterward with further detail or response to arguments

Sub-domain: Interpersonal Communications Skills

- On the Receiving End: Identify and summarize the main points and pertinent details of a message or set of instructions or conversation from speakers who may have different viewpoints than the listener, follow a set of instructions, apply oral instructions from one setting to another team decision, formulate questions for the sake of clarifying a situation
- As the Deliverer of a Message: Speak clearly and audibly, clearly explain instructions to another for effective action, use appropriate language and gestures, respect turn-taking of other members, avoid drawing conclusions prematurely
- Identify circumstances and viewpoints that may amplify or inhibit the messages of other speakers (i.e., emotion, low language skills, cultural differences, speech impairments, excessive speed)

Sub-domain: Basic Information Retrieval Skills

- Library/Information-Source Use: Explain systems for organizing information, follow different strategies for finding information, evaluate the accuracy of sources, document sources so others can locate them
- Document Use: Identify basic methods for indexing information, identify common forms of information (i.e., addresses, geographical abbreviations) and the basic logic of such visual displays as flow charts, maps, blueprints, identify main points of information conveyed by graphic displays
- Document Use: Read and interpret standard numeric displays, interpret graphic information to give directions or instructions, apply information from

graphic displays to solve a problem, translate information from one graphic format to another (such as bar charts to pie charts)

- Document Use: Fill out standard forms
- Document Use: Explain the importance of copyright laws and how they might affect document use

Domain: Collegiate Academic Skills

Sub-domain: Organization Strategies

- Time management as it relates to integrating the life of a student with other life activities
- The ability to set long- and short-term goals independent of faculty direction
- Strategies for maximizing time and space resources for academic purposes
- The ability to prioritize tasks within time constraints

Sub-domain: Study Skills

- The ability to read and study in depth; to read critically, evaluate and analyze arguments, and layers of meaning in written texts
- Effective use of format and informational reading strategies for academic texts and course syllabi
- Strategies for memorization, note-taking, test preparation and test-taking

Sub-domain: Active Learning Skills

- Self-identification of learning preferences and strategies for adapting learning preferences for expanded learning opportunity
- The importance of class presence in different instructional settings
- A distinction between active and passive learning

- Techniques for effective, active listening
- Techniques for interacting with classmates and study-groups in electronic settings
- Effective note-taking
- The habit of reading from sources beyond work or academic demands
- The ability to prepare a reading list, read, and keep a reading journal or discuss the readings with others

Sub-domain: Academic Advising

- The importance of the advising process and steps to a positive advising experience
- Appropriate expectations for advisors and advisees
- Effective academic planning skills

Sub-domain: Academic Integrity

- The definition of academic honesty by giving examples of dishonesty
- Identification of motivations for dishonesty and ways to avoid becoming involved in dishonesty
- The ability to make a case for such intellectual values as clarity, accuracy, rigor, and excellence as they relate to truth

Sub-domain: Stress and Procrastination Management

- The ability to identify stress factors that affect you individually
- Techniques for managing stress, including test anxiety
- The ability to identify avoidance behaviors and behaviors to overcoming avoidance

Domain: Collegiate Reasoning and Problem-Solving Skills

Sub-domain: Problem Identification and Clarification

- Express identified problems or questions in several different ways, divide the problem or question into related problems or sub-questions
- Identify important ethical or philosophical issues associated with a particular problem and
- Demonstrate how the perceptions or resolutions of the problem differ in relationship to the underlying issues
- Identify the implications for presenting resolutions to audiences with varying values
- Identify, explain the implications, and justify the use of the following for the solution of a posed problem: specific theories, axioms, laws, principles, or models

Sub-domain: Identification and Clarification of Stated and Unstated Assumptions

- Identify assumptions associated with a given theory, definition, axiom, law, principle, or model as it is applied to a particular problem or question
- State how the validity of assumptions associated with a given solution might be evaluated with further information, and provide a preliminary assessment of validity of given assumptions
- Identify inconsistencies among assumptions associated with a problem or question, and state the consequences of a solution based on at least one invalid assumption

- Reexamine and reformulate a question or problem given that one or more assumptions have been found to be invalid
- State how a given set of assumptions may prejudge a solution

Sub-domain: Analytical Planning and Information-Gathering

- Generate hypotheses, propositions or interpretations related to a given problem; determine if these can be tested or verified through information or evidence
- Identify specific informational items that would be helpful in proving a particular hypothesis, proposition or interpretation (data, facts, observations); construct information gathering strategies
- Evaluate the relevance and credibility of particular pieces of information for testing or verifying a given hypothesis or proposition; determine whether a sufficient body of information has been gathered to test or verify the hypothesis or proposition

Sub-domain: Interpretation and Analysis of Information/Data

- Assess the credibility of information and determine how to deal with insubstantial information: a) by determining fact from fiction, b) recognizing biased language, and c) determining false, biased, or doubtful assumptions behind arguments
- Sort, manipulate or categorize information or data for solving problems:
    - note similarities and differences
    - organize information into categories on the basis of specific characteristics

- Use appropriate quantitative or qualitative techniques to summarize and identify causal and non-causal relationships in supplied information; identify multiple interpretations
- Demonstrate self-reflection by reviewing and explaining one's approach and reasoning in solving a particular problem
- Demonstrate the ability to apply rules, models, and understanding from different subject areas, cultures to a problem in a different discipline or tradition

<u>Sub-domain: Drawing and Presenting Conclusions</u>

- State one or more conclusion[s] for a problem, based on a previously-completed analysis
- Explain how any conclusions are linked to particular pieces of information and/or relationships among them
- Assess the overall plausibility and reasonableness of each conclusion
- Revise advanced conclusions as new or different information emerges and identify particular ways conclusions could change if alternative perspectives are considered
- Identify one's own point of view and its impact on interpretations or conclusions
- Identify possible, alternative conclusions resulting from the given evidence
- Determine how to best present conclusions for varying audience needs:
    - written, oral, graphic formats
    - audience sophistication, knowledge about the subject

- communication strategies for making the information persuasive and intelligible

Sub-domain: Communication and Language Skills and Mathematics and Quantitative Skills Beyond the Foundational Level

- Apply language and communication skills to given problems (Applied skills relate those outlined in the Language and Communication subdomain but at a higher level of expectation.)
- Apply reasoning and problem-solving skills to given problems constructed to support the assessment of higher level mathematics and quantitative skills (Standards will be drawn from both the Language and Communication and Mathematics and Quantitative Reasoning subdomains, with a higher level of expectation.)
- Submit specific exhibits produced in coursework or life experience; at least one example will include multiple drafts of the writing piece, with the writer's reflective commentary and reasons for the changes between drafts (Normally, exhibits of this kind would be included as part of the student's portfolio, collected under the guidance of his or her advisor/mentor.)

Sub-domain: Cross-Disciplinary Issues and Themes

- Demonstrate familiarity with and be prepared to discuss:
    - Multi-cultural perspectives including how different cultural groups contribute to pluralistic societies for the U.S. and countries outside the U.S.

- Historical consciousness including broad knowledge of major historical events and periods, along with ideas or perspectives rooted in particular historic periods
- Philosophical awareness, including broad exposure to important philosophical and ethical questions that recur across cultures and historical periods, such as, "What is the nature of justice?"
- Aesthetic sensitivity and judgment, including broad distinction among different artistic or aesthetic traditions, and the ability to explain personal aesthetic choices
- Analytical self-reflection, the ability and willingness to recognize one's own point of view, learn from errors and others' viewpoints, and revise one's own views if needed

Domain: Basic Work-Related Skills

Sub-domain: Basic Observational Skills

- Sustained attention to selected details when faced with learning new tasks
- The ability to visualize how components function as parts of larger systems or processes

Sub-domain: Learning from Role Models

- Identification and observation of role models who could add to a student's knowledge and understanding of ethics, skills, decision-making, and other performance factors in a given career area
- Evidence of consultation with a role model and the application of knowledge to project or work activities

Sub-domain: Monitoring and Evaluating Own Performance

- Time Management:
    - An understanding of assigned schedules and the ability to bring closure to scheduled events
    - The ability to prioritize and monitor progress to meet assigned schedules
- Quality:
    - Recognition of established expectations and the practice of critiquing personal work by those standards
    - The practice of seeking and responding to advice and criticism from others
- Career
    - Self-knowledge of interest and satisfaction with a particular career, and knowledge of various career options and preparation required for them

Sub-domain: Personal Professional Qualities

- The ability to persevere to completion with appropriate assertiveness
- Responsibility for personal morale
- The ability to work under ambiguous and uncertain conditions
- The personal acceptance of responsibility for tasks and project outcomes

Sub-domain: Completion of Tasks/Assignments to Client or Supervisor Specifications

- Working with Supervisor:

    - The abilities to consult with a supervisor for planning, reporting, informing, negotiating, and receiving supervisory evaluation
- Working with Clients:
    - The importance of good customer service
    - The importance of a commitment to quality
    - The abilities to define client needs, negotiate, monitor, and evaluate client satisfaction during and after the customer transaction

<u>Sub-domain: Tools and Techniques for Working with Others</u>

- Basic Interpersonal Skills:
    - Willingness to identify and function with a team, exhibit trust, provide encouragement, share information, foster open and honest communication
    - Positive attitude and role flexibility
    - Respect for and willingness to accommodate differences among co-workers
    - Identification of conflict resolution techniques
- Team Skills:
    - Identification of goals and practice of goal-setting, problem-solving, prioritizing, continuous and final review, and all project-management skills as they pertain to team projects
    - Ability to communicate the results of a team project to an external audience

    - Willingness and capacity to adapt to new circumstances in a team setting

<u>Sub-domain: Personal and Organizational Responsibility and Ethics</u>

- Personal Responsibility and Ethics:
    - The importance of integrity, knowing consequences, maintaining confidentiality, and willingness to assume responsibility for personal actions
    - Initiative for undertaking new tasks
    - The understanding of and ability to apply a code of ethical principles to decision making
    - The explanation and demonstration of respect for people and property and environment
- Personal Responsibilities within the Organization
    - Identify the "scope of practice" associated with a particular job or assignment
    - Identify how people and their organizational roles mutually enhance the organization
    - Exhibit pride in the organization and in one's work; demonstrate a service orientation
- Organizational Responsibilities and Ethics:
    - Compliance:
        - Implement the specific responsibilities of a job including credibility, dependability, industry-specific procedures, safety

observance, the ability to read financial statements, observance of personal standards of appearance

- Be able to describe how specific business culture may dictate how work is done, and how such dictates might conflict with personal values

- Integrity:
  - Determine long-term outcomes and accountability related to behavior or operation
  - Identify how company integrity is based on employee integrity, explain the importance [of] refraining from unethical practices in personal and professional life

Sub-domain: Learning Skills

- Planning: The ability to create a learning plan which includes timelines for work, educational, and assessment goals
- Quality: The ability to self-monitor learning process and strategies for improvement and success
- Strategy: Self-identification and understanding of learning style, how to work with study groups, how to utilize textbook components

Domain: General Education Distributions

Demonstration of Abilities in:

- Natural Sciences (two course-equivalent outcome examination)
- Social Sciences (two course-equivalent outcome examination)
- Humanities (two course-equivalent outcome examination)

- History (one course-equivalent outcome examination)