



OPPORTUNITIES FOR LEADERSHIP AND ORGANIZATIONAL DEVELOPMENT
DURING CREATION AND DEVELOPMENT
OF A PROPOSED ONLINE LEARNING PROGRAM

by

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Abstract

The planning process for a new online learning program provides an opportunity to model the five practices of effective leadership. Through a team approach, leaders further staff development by providing meaningful opportunities to influence their institution's programs and learning activities, gain valuable experience in delegated leadership roles, and observe effective active management. In a higher education setting, the process may aid in demonstrating the institution's commitment to educational excellence and yield innovative learning opportunities for students during and following planning. Prior to initiating the planning process, leaders must consider available resources, time, staff attitudes and likely reactions, because the wrong approach could adversely impact individual staff and the organization.

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Introduction

The goal of any enterprise is to succeed. In higher education, success usually involves providing a quality education to student customers while assuring the financial health of the institution and complying with various regulatory requirements. Sustained success may also require innovation, including adoption and development of new approaches to education, to take advantage of new opportunities.

This paper examines the role that leadership and related competencies can and should play in preparing for a major new online educational delivery system at a small private college. Rather than discuss a hypothetical situation, this paper describes a real case, examining the current capabilities and needs of and challenges facing Patten University. The example is used to examine opportunities to use the planning process itself as a venue to model many aspects of leadership and, as is particularly appropriate for a learning institution, to promulgate new learning opportunities for current and future staff and students. Finally, the paper discusses the thesis that leadership ideally begins before (a) the project goal is announced, (b) the decision process is outlined, (c) the team composition is determined, and (d) the charge is delivered. (Note that this paper is not intended to be a complete review and analysis of the proposed program, but instead is intended to describe and illustrate the various leadership competencies that will be needed for success.)

The first section of this paper describes Patten University—it's (a) mission, (b) history, (c) physical setting and current programs, (d) library and computer resources, (e) governance, and (f) the regulatory framework within which it operates. The second section describes the need and desire for a distance learning program. The third section examines leadership in general—it's (a) purpose, (b) goals, and (c) objectives. The fourth section outlines a process for situation

assessment that identifies some, but not all, of the key issues that Patten must address to realize a successful distance learning program. The fifth section identifies potential leadership opportunities within the situation assessment process. Using an approach similar to that presented in the fourth and fifth sections, the sixth and seventh sections describe a process for decision assessment and leadership opportunities therein. The eighth section (a) discusses additional considerations that should influence process and team selection and (b) arrives and justifies the central thesis of this paper. The final section summarizes the paper and conclusions.

Patten University

Mission

Patten University is a private, coeducational, interdenominational Christian college that provides undergraduate and graduate education. Patten's mission is to provide an excellent education to motivated and committed students from a broad diversity of (a) ethnic, (b) geographic, and (c) socioeconomic backgrounds. Patten's program emphasizes three core values: (a) learning, (b) faith, and (c) community (Patten College, 2002, p. 8). Dr. Leroy Lawson (2003) notes that unlike some colleges which focus on educating just the top 5 or 10 percent of high school graduates, Patten affords opportunity to students who would otherwise be overlooked. President Gary Moncher (2003) notes that "This institution wants to make a difference," not just in the lives of students, but also to the local and worldwide communities.

History

Located in Oakland, California, Patten was founded by Dr. Bebe Patten in 1944 as Oakland Bible Institute, offering individual courses and certificate programs. In 1960, the school (a) moved to a new location, (b) expanded its programs, and (c) became Patten Bible College. The first four-year degrees were awarded in 1969. In 1976, the college (a) expanded its programs

to include liberal arts and (b) was renamed Patten College. In 1998, Patten became an affiliate college of the Church of God; Patten currently houses the denomination's Theological Seminary West (Patten 2002, p. 9; Moncher, 2003). Since that time, Patten has established extension sites or cooperative programs in (a) California (Rio Linda, Fresno, and Fullerton), (b) Oregon, (c) New Mexico, (d) Taiwan, (e) Hong Kong, and (f) Sri Lanka. Patten also cooperatively offers a professional certificate program to support the Western Region of the International Church of the Foursquare Gospel (Frank Markow, personal communication). In March 2003, because of the international scope of its programs and prevalent overseas use of the Spanish word *collegio* to describe high school-level programs, the institution's name was officially changed to Patten University (Gary Moncher, personal communication).

Physical Setting and Current Programs

Patten's main campus is situated on five acres of land within a residential part of Oakland, California. The university, accredited by the Western Association of Schools and Colleges, has about 700 students. On its main campus, Patten currently offers degrees and certificates in majors that are listed in Table 1. Overseas programs primarily focus on business-related courses and degrees. Extension sites within the United States currently offer only a ministry-related Associate degree (Patten, 2002, p. 35; Frank Markow, personal communication).

Library and Computing Resources

Patten's Blumenthal Library houses more than 35,000 books, 180 periodicals, and various audio-visual materials. The library offers online access to (a) FirstSearch (which contains about 50 separate databases); (b) the American Theological Library Association's Index of Religious Periodicals and Monographs; (c) the Gale Literature Resource Center, RAND California; (d) PsychINFO; Proquest; (e) Wilson's Education Abstracts Fulltext; and (f) information on other

Table 1

Degrees, certificates, and majors currently available from Patten University

Degree or Certificate	Major
Bible Certificate	
Associate of Arts:	Biblical Studies
	Church Ministry
	Early Childhood Development
	General Studies
Bachelor of Arts:	Art
	Biblical Studies
	Christian Leadership
	Church Ministries
	Communication
	Liberal Studies
	Organizational Management
	Pastoral Studies
	Sacred Music
Master of Arts:	Education
Master of Business Administration	
Master in Church Ministries	
Multiple Subject Teaching Credential	

Note: The Master in Church Ministries is offered through the on-campus extension of the Church of God Seminary.

Adapted from Patten University (2002, pp. 35, 69).

selected public databases (Patten College, 2002, pp. 14-15). The library catalog is neither digital nor available online and, as of mid-2002, the library lacked resources necessary to convert the catalog (Ann Ziemans, personal communication).

Patten has a small computer laboratory for student use and a local area network for faculty and staff. The university also has a small technical support unit. However, Patten's web site is outdated. For example, the web site currently lists tuition costs for only 1999-2000 (Patten College, 1999a). Patten's web site has few, if any, services available for students. The library catalog is not available online. While Patten's home page (www.patten.edu) does include a link

(*Class Online*) to a page where instructors may provide links to online resources, that page only lists one class (Music History II) which bears the name of a former instructor (Burns). The university is aware of these problems and has contracted for a new web site, but its development is months behind schedule (Gary Moncher, personal communication).

University Governance and Organization

A Board of Trustees, comprised of 14 appointed and two ex officio members govern Patten University. The university's President, Dr. Gary Moncher, directs day-to-day operations. Organizationally, Patten has not yet restructured its governance structure to that of a typical university, although it probably will do so during the next few years (Gary Moncher, personal communication). Currently, administrative units are overseen by a mix of (a) Deans (Enrollment Services and Student Services), (b) Directors (Admissions, Athletics, Financial Aid, and Safety), and (c) staff holding various titles (e.g., Comptroller, Information Technology, Library Services, and Plant Manager). Academic operations are overseen by the (a) Academic Vice President, (b) Assistant Academic Vice President, and (c) Associate Dean of Education. On-campus academic programs are divided among four divisions: (a) Arts and Sciences (with two co-chairs), (b) Biblical and Theological Studies, (c) Business and Administrative Professions, and (d) Christian Ministries. Equivalent to an academic division is Extended and Cooperative Education, overseen by Director Frank Markow (Patten University, 2002, p. 5-7).

The Academic Senate, comprised of (a) all full-time, (b) three part-time, and (c) one adjunct faculty, shares the governance with the Administration and the Board of Trustees (Patten College, 1999b, ¶ 1 and Article IV). The Academic Senate represents the faculty " . . . in recommending policy decisions relating to curricula, student admissions, academic standards,

student services, facilities, employment workload, equipment requirements, technology, and administration as these elements affect the academic program" (Patten College, 1999b, ¶ 1).

The university also calls for the faculty to play a central role in policy decisions relating to (a) curricula, (b) academic standards, (c) personnel processes, and (d) institutional policy and operations (including student services, facilities, and administration) "where these elements impact the academic program" (Patten College, 1999b, ¶ 2). Regarding curriculum and academic climate, the Academic Senate Constitution states that:

In vital areas of curriculum and other academic policy matters, the Faculty has the primary role in decision-making subject to the approval of the Board of Trustees. The Faculty also has a major role in policy regarding research, scholarly activity and other Faculty interests. Off-campus instruction and continuing education are areas that require Faculty input in curriculum areas. (Patten College, 1999b, Article III)

Regulatory Framework

Private postsecondary education in California is governed by the *Private Postsecondary and Vocational Reform Act of 1989* (California Education Code §§ 94700-94999). Section 94739 (b) (7) exempts institutions that are accredited by the senior commission or junior commission of the Western Association of Schools and Colleges (hereafter referred to as WASC) from the provisions of the act, instead relying on the accrediting entity and the accredited institution for quality control (Joyce Leslie, personal communication). Teaching credential and related programs are approved by the California Commission on Teacher Credentialing. The U.S. Department of Education and State of California have approved Patten to participate in all (a) grant, (b) loan, and (c) work-study programs (Patten, 2002, p. 11).

WASC currently requires that all degree programs in which 50 percent or more of the program is offered via distance learning (including satellite, video, Internet, or any other mode)

must be submitted to the Substantive Change Committee for prior approval (WASC, 2001, p. 70).

Desired New Programs and Approaches to Learning

As previously noted, Patten has close ties with the Church of God, cooperatively providing training to the denomination's pastors. Many of the denomination's pastors entered the ministry without formal training—approximately 65 percent lack a baccalaureate degree (Moncher, 2003). Many of these pastors are bi-vocational and cannot leave their (a) income-providing jobs and (b) churches for an extended period to obtain a degree. Also, about 80 percent of the denomination's members reside outside the United States.

The denomination has recognized that it needs new approaches to help train and educate existing and potential workers in diverse locations throughout the western US and the world. Patten's extension sites in the western US are a response to this need. However, many workers reside in sparsely populated areas that lack (a) qualified faculty, (b) academic libraries, and (c) other needed learning resources—areas where there is little prospect of sustaining a critical mass of students to support an extension site for more than a very few years. Also, at present, only a two-year associate degree is available through these extensions, owing to restrictions currently imposed by WASC (Frank Markow, personal communication).

In recognition of these needs and current limitations, the Church of God has requested that Patten consider developing a distance learning program to provide training in church leadership and management.

Review of Leadership

Guralnik (1984, p. 801) defines leadership as (a) "the position or guidance of a leader" and (b) "the ability to lead," and defines leader as "a person or thing that leads; directing, commanding or guiding head, as of a group or activity." Kouzes and Posner (2002, p. 22) summarize leadership as comprised of five practices and ten commitments (Table 2).

The Center for Creative Leadership [CCL] (2002c, ¶ 2) defines strategic leadership as "thinking, acting and influencing others in ways that enhance an organization's sustainable competitive advantage." CCL asserts that strategic leadership includes integrating short- and long-term and internal and external perspectives and involves three types of processes:

1. Thinking [(a) scanning and gathering, (b) systems thinking, and (c) analysis and filtering],

Table 2
The five practices and ten commitments of leadership

PRACTICE	COMMITMENT
Model the Way	1. Find your voice by clarifying your personal values.
	2. Set the example by aligning actions and shared values.
Inspire a Shared Vision	3. Envision the future by imagining exciting and ennobling possibilities.
	4. Enlist others in a common vision by appealing to shared aspirations.
Challenge the Process	5. Search for opportunities by seeking innovative ways to change, grow, and improve.
	6. Experiment and take risks by constantly generating small wins and learning from mistakes.
Enable Others to Act	7. Foster collaboration by promoting cooperative goals and building trust.
	8. Strengthen others by sharing power and discretion.
Encourage the Heart	9. Recognize contributions by showing appreciation for individual excellence.
	10. Celebrate the values and victories by creating a spirit of community.

Adapted from Kouzes and Posner (2002, p. 22)

2. Acting [(a) balancing tactics and strategy, (b) alignment, and (c) decision-making despite uncertainty], and
3. Influencing [(a) creating and assuring a common understanding, (b) recruiting partners and creating enthusiasm, and (c) building synergistic relationships] (§ 2).

CCL (2002b, § 1) notes that strategic leadership requires multiple perspectives and inputs to ensure the long-term competitive advantage of the organization. "[The] effective strategic leader must understand how the various parts of the system work together so that he or she can help others see their part in achieving the goals" (CCL, 2002d, § 7).

Many lists of leadership competencies have been developed. Some of these lists are specialized (e.g., Pritchard's [1999] list of competencies for modern military leaders) while others are intended to be all encompassing. Table 3 illustrates the range of competencies listed in just a few sources. CCL (2002a, § 5) notes: "Just as important as understanding and assessing the characteristics that drive leadership success is the ability to recognize the appropriate weight or attention that should be given to each."

In the case being considered—development of a future distance learning program for Patten University—assessment and analysis of various (a) needs (e.g., learner needs, resource needs, business needs), (b) opportunities, (c) alternatives, and (d) desired outcomes undoubtedly will play a major role. However, according to Altier (1999, p. 27), the first steps in the any decision-making or problem-solving process is to assess the situation.

Situation Assessment

Altier (1999, pp. 27-37) suggests that situation assessment has five steps:

1. Recognize situations of potential concern
2. Separate problems and situations into unique sets

Table 3

A sampling of leadership competencies listed by various authors

Competency	Source
1. Action Management	Public Service Commission of Canada (2001, ¶ 6)
2. Adaptability	Thorne (2002, ¶ 11)
3. Analytical Thinking	Thorne (2002, ¶ 11); Wang (2002, #9-10)
4. Apply Current Research, Theory, and Practice	Wang (2002, #2)
5. Appraising and Developing Staff	Thorne (2002, ¶ 11)
6. Assess Effectiveness	Wang (2002, #18)
7. Business Perspective	CCL (2002a, ¶ 4); Wang (2002, #21)
8. Customer Relations	Thorne (2002, ¶ 11)
9. Cognitive Capacity	Public Service Commission of Canada (2001, ¶ 3)
10. Communication	CCL (2002a, ¶ 4); Public Service Commission of Canada (2001, ¶ 12); Thorne (2002, ¶ 11); Wang (2002, #1)
11. Conducting Needs Assessments	Wang (2002, #6)
12. Continuous Learning	Pritchard (1999, p. 24); Wang (2002, #3)
13. Creativity	Pritchard (1999, p. 24); Public Service Commission of Canada (2001, ¶ 4)
14. Credibility	CCL (2002a, ¶ 4)
15. Curriculum/Program Design	Wang (2002, #7)
16. Delegating	Thorne (2002, ¶ 11)
17. Developing and Empowering	CCL (2002a, ¶ 4)
18. Design Instructional Management Systems	Wang (2002, #22)
19. Entrepreneurship	Pritchard (1999, p. 24)
20. Ethics and Values	Public Service Commission of Canada (2001, ¶ 14)
21. Executive Image	CCL (2002a, ¶ 4)
22. Flexibility	Pritchard (1999, p. 24); Public Service Commission of Canada (2001, ¶ 15)
23. Forging Synergy	CCL (2002a, ¶ 4)
24. Fostering Teamwork	Thorne (2002, ¶ 11); Wang (2002, #20)
25. Global Awareness	CCL (2002a, ¶ 4)
26. Initiative	Pritchard (1999, p. 24)
27. Influencing	Pritchard (1999, p. 25); Thorne (2002, ¶ 11)
28. Inspiring Commitment	CCL (2002a, ¶ 4)
29. Instructional Design Skills	Wang (2002, #13-17)
30. Interpersonal Relationships	CCL (2002a, ¶ 4); Public Service Commission of Canada (2001, ¶ 11); Thorne (2002, ¶ 11)
31. Judgment	CCL (2002a, ¶ 4); Thorne (2002, ¶ 11)
32. Leading Change	CCL (2002a, ¶ 4)
33. Learning from Experience	CCL (2002a, ¶ 4)
34. Leveraging Differences	CCL (2002a, ¶ 4)
35. Motivating People	Thorne (2002, ¶ 11)
36. Negotiating	Thorne (2002, ¶ 11)
37. Organizational Awareness	Public Service Commission of Canada (2001, ¶ 7)
38. Organizational Commitment	Pritchard (1999, p. 25)
39. Partnering	Pritchard (1999, p. 25); Public Service Commission of Canada (2001, ¶ 9-10); Wang (2002, #20)
40. Planning and Organizing	Thorne (2002, ¶ 11); Wang (2002, #19 & #23)
41. Problem Solving	Wang (2002, #5)
42. Research Skills	Wang (2002, #4)
43. Resilience	Pritchard (1999, p. 24)
44. Results Orientation	CCL (2002a, ¶ 4); Thorne (2002, ¶ 11)
45. Self-Confidence	Public Service Commission of Canada (2001, ¶ 16)
46. Select and Use Appropriate Techniques	Wang (2002, #8)
47. Stamina/Stress Resistance	Public Service Commission of Canada (2001, ¶ 13)
48. Strategic Planning	CCL (2002a, ¶ 4)
49. Strategic Vision	Thorne (2002, ¶ 11)
50. Teamwork	Public Service Commission of Canada (2001, ¶ 8)
51. Visioning	Public Service Commission of Canada (2001, ¶ 5)

Smith (2003, this paper)

3. Define givens or predetermined constraints
4. Set priorities
5. Select an appropriate decision-making process (pp. 27-37)

Step 1: Recognize

Altier suggests that several neutral questions be asked to aid in situations of potential concern. These questions include:

1. What uncertainties [and/or] unknowns exist?
2. What questions need to be answered?
3. How could things change?
4. What is going differently than expected?
5. If the present trends continue, where could things go?
6. What isn't guaranteed?
7. What moves could someone else make that could change things? (p. 29)

In Patten's case, there are several unknowns and uncertainties. They include, but are by no means limited to:

1. Amount of funds needed to initiate the distance learning program.
2. Amount of start-up funding that is likely to be available.
3. Number of students that would enroll in distance learning courses.
4. Source and availability of trained faculty.
5. Learning management platform to be used.
6. Whether the learning management system will use in-house servers or be outsourced.
7. How much technical support users (instructors and learners) will require.
8. Whether technical support will be outsourced.

9. Whether online library services (e.g., NetLibrary) will be available.
10. Specific courses and curriculum to be offered.
11. Whether instructors also will want to use the system to enhance classroom learning.
12. The leader for developing and administering the system.
13. Availability of support for course conversion and development.
14. Whether the proposed distance learning program will be approved by the accrediting entity.
15. What hardware, software, and type of connection (e.g., dial-up, DSL) students and instructors will have.
16. Level of computing experience and expertise of instructors and students.

Step 2: Separate

Separating Issues and Decisions

Altier (1999, pp. 29-33) suggests that rather than addressing a complex problem that involves a myriad of (a) issues, (b) options and (c) decisions (in his words, a *mess*), decision makers should instead (a) separate the complex into smaller sets of problems and decisions and (b) analyze unplanned potential problems. This process helps (a) provide some order to the approach and (b) enables identification of dependent relationships—decisions that must first be made before other problems or issues logically can be addressed in detail. For example, the university probably should first decide what, if any, learning management system will be used before designing an instructor training program. However, prior to deciding what learning management system to use, a host of other issues should be considered. Smith (2003b) summarized several key issues [(a) business need; (b) return on investment; (c) identification of target groups, possible quick successes, and stakeholders and their expectations; (d) functional

and non-functional requirements; (e) key user roles; and (f) technical requirements] that are critical to this selection process. Smith (2003a) reviewed the capabilities of numerous learning management systems and recommended that Patten further investigate the products three vendors: (a) Blackboard, (b) eCollege, and (c) VCampus.

While the technological platform is a critical part in the design of a web-based education program, success involves much more. Rosenberg (2002) states:

The question is no longer whether organizations will implement online learning, but whether they will do it well.... An effective e-learning strategy must be more than the technology itself or the content that it carries. It must also focus on critical success factors that include building a learning culture, marshaling true leadership support, deploying a nurturing business model, and sustaining change throughout the organization (p. xvi).

There is great pressure to *do it well*—not doing *it* (online learning) well risks loss of accreditation, which affords significant competitive advantage. Also, loss of accreditation would serve Patten's former and current students ill, sending a very public signal that previously awarded degrees might be or are (a) suspect, (b) inferior, or (c) substandard. WASC (2001) notes, "[To] become and remain accredited, each institution is expected to demonstrate that it is committed to developing and sustaining Institutional Capacity and Educational Effectiveness." WASC's prescribes a core commitment to institutional capacity wherein "[the] institution functions with clear purposes, high levels of institutional integrity, fiscal stability, and organizational structures to fulfill its purposes." WASC describes the core commitment to educational effectiveness thusly:

The institution evidences clear and appropriate educational objectives and design at the institutional and program level. The institution employs processes of review, including the collection and use of data, that assure delivery of programs and learner accomplishments at a level of performance appropriate for the degree or certificate awarded (p. 5).

Smith (2002a, p. 3) identified four critical issues for the success of Patten's e-learning effort. They are how to:

1. Provide a means to develop and promote effective learning communities [(a) student-student, (b) student-faculty, and (c) faculty-faculty].
2. Provide students and faculty with quick and easy access to needed resources (including (a) library, (b) administration, and (c) other needed support).
3. Provide a means for remote faculty to (a) access knowledge about processes, policies, procedures, etc.; (b) obtain training, and (c) collaborate to develop future best practices.
4. Improve Patten's management systems to (a) accommodate remote campus operations, (b) automate web updates, (c) facilitate customer (students and faculty) service, and (d) assure accountability.

While Smith (2002a) concisely summarizes the requirements for doing it well as it relates to selection of a delivery system, each of the above statements actually imply several separate and independent issues that might easily be overlooked and that may require additional (a) resources, (b) decisions, and (c) actions. For example, Smith's item 3 might be dissected thusly:

1. How will Patten provide a means of accessing knowledge about processes?
2. How will Patten provide a means of accessing knowledge about policies?
3. How will Patten provide a means of accessing knowledge about procedures?
4. a) If the above items are to be posted on a LAN or web site, who will do the posting?
(b) If mailed, who will distribute the updates?
5. How will instructors obtain training?

6. What types of training will be available to instructors?
7. Who will develop the training?
8. Who will deliver the training?
9. Who will pay for development and/or delivery of the training?
10. How will instructors collaborate?
11. If collaboration is to occur online, who will support the system?
12. If, through the collaborative process, changes in (a) policy, (b) process, or (c) procedures become desirable, how will these needs be communicated to the administration and academic senate, especially if they are not part of the online community?

Some of the previously stated unknowns obviously will affect the answers to these 12 questions. For example, if existing faculty will teach the courses, instructor training probably would focus more on effective online teaching techniques than on Patten policies, procedures, and distinctives. However, if additional faculty—most of whom had significant online teaching experience—were recruited, the initial training likely would devote some time to policies, procedures, and distinctives. Other questions abound, such as: (a) Who will develop online versions of existing courses? (b) Will assistance be available to aid instructors in digitizing course materials? (c) What additional courses (e.g., technology related) are needed for program success? (d) Might some of the instructor training courses be incorporated in other degree or certificate programs? And so on.

Identification of Potential Problems

Altier (1999, p. 33) suggests that there are benefits to separating potential problems into smaller sets, perhaps by function. Palloff and Pratt (2001) suggest that the keys to success

include ensuring (a) access to and (b) familiarity with the technology being used. The phrase *ensuring access* logically leads to identification of potential groups of technological problems such as:

1. Identify potential problems with the server, software, and delivery system at the university.
2. Identify potential problems with the hardware or software (meaning any hardware or software that the student needs to complete the course) at the student's end.
3. Identify potential problems with the hardware or software at a remote faculty site.
4. Identify potential problems with the transmission network (p. 26).

The phrase *familiarity with the technology* suggests related to human knowledge, such as:

1. Identify potential problems with student familiarity with the technology.
2. Identify potential problems with faculty familiarity with the technology.
3. Identify potential problems with Information Technology staff familiarity with the technology.
4. Identify potential problems with administrative staff familiarity with the technology.

Other potential business and logistical problems might include:

1. Identify potential problems that would result from lack of qualified faculty.
2. Identify potential problems that would result from lack of students.
3. Identify potential problems that would result from lack of student aid.
4. Identify potential problems that would result from dissatisfaction of students with the online learning experience.
5. Identify potential problems that would result from dissatisfaction of instructors with the online teaching experience.

Step 3: Define Givens

In the case of this proposed program, the constraints are relatively few, but are significant.

1. In the process of developing and implementing the distance learning program, nothing shall jeopardize Patten's accreditation. This implies that the proposed program will (a) recognize and (b) operate under WASC's previously stated two core commitments. It also implies that no more than one-half of the courses required for any degree program may be completed via online instruction until after receiving WASC approval.
2. The program largely will be self-supporting, meaning that it will not be subsidized by other parts of Patten's current operation. However, this does not preclude grants or contracts to support initial development or on-going operations.
3. Initial offerings probably will include bible or ministry-related courses, especially if start-up funds are available from Church of God.

The start date and program expansion rate are undecided.

Step 4: Set Priority

Altier (pp. 34-35) suggests that after recognizing and separating the various situations, it is appropriate to begin setting priorities, based on factors such as (a) importance, (b) urgency, (c) available resources, and (d) dependent relationships. Table 4 illustrates his suggested approach. Note that the rightmost column of this table indicates that Problem 2 (select learning management system) should precede other issues. In part this is because some potential vendors also provide technical support to faculty, staff, and/or students. Thus, for example, if a vendor who does not provide support to students is selected, other arrangements must be considered.

Table 4

Sample priority-setting matrix, using some of the previously identified problems, plus a few additional issues

Problem (or Needed Task)	Importance	Urgency	Preceding Dependent Problem
1. Provide access to information about policies, procedures, etc.	H	M	Problem 2
2. Select learning management system	H	H	
3. Provide technical support for learning management system	H	M	Problem 2
4. Arrange for technical support for students	M	M	Problem 2
5. Arrange for technical support for faculty	M	H	Problem 2
6. Determine faculty pay rates	M	H	
7. Recruit faculty	H	H	Problem 6
8. Determine types of training faculty needs	H	H	
9. Develop training for faculty	H	H	Problems 2 & 8
10. Train faculty	H	H	Problems 7, 8 & 9
11. Develop training for administrative staff	H	M	Problem 2
12. Train administrative staff	H	M	Problem 11
13. Determine student fee rates	M	M	
14. Recruit students	M	L	
15. Provide technical support for students	H	L	
16. Provide technical support for faculty and staff	H	M	
17. Provide time and resources for course conversion/development	H	M	
18. Provide a means for faculty collaboration	H	H	
19. [Et cetera]			

Key: H = High; M = Moderate; L = Low.

Step 5: Select Process

Altier (1999, pp. 35-36) suggests that the fifth step is to select an appropriate decision making process. Because the proposed online learning program is a planned future event, Altier recommends using decision analysis.

Role of Leadership in Situation Assessment

The preceding section (Situation Analysis) begins to demonstrate some leadership competencies, especially (a) analytical thinking (Thorne, 2002, ¶ 11; Wang, 2002, #9-10) and, via reference to previous studies (Smith, 2003a; 2003b), (b) business perspective (CCL, 2002a, ¶ 4; Wang, 2002, #21), (c) customer relations (Thorne, 2002, ¶ 11), (d) organizational awareness (Public Service Commission of Canada, 2001, ¶ 7), and (e) organizational commitment (Pritchard, 1999, p. 25). Some leaders might consider this simple, one-person, analytical thinking approach to be the most efficient because it (a) can be accomplished by an individual (hopefully quickly), (b) minimizes the need for meetings and consensus building, and (c) avoids having to convince other workers to set aside current work for a new priority. However, the one-person approach may be flawed in several ways. The one-person approach:

1. May miss an opportunity to benefit from the (a) knowledge, (b) skills, and (c) abilities of additional potential participants. The insights of these additional participants might be particularly useful in analyzing a complex problem such as this.
2. May risk alienating several potential participants, including (a) administrative and information technology support staff, (b) potential instructors, and (c) people who may have responsibility for oversight of university programs).
3. May miss an opportunity to embark on early formation of a core team who will eventually be responsible for the success or the online delivery system program.
4. May miss an opportunity to begin educating participants on (a) the scope of the proposed program, (b) potential problems, (c) near- and long-term needs. Sharing these sorts of data might initiate and stimulate thought processes of key participants.

5. May miss an opportunity for Patten to demonstrate its commitment to educational effectiveness, as required by WASC.

For example, WASC (2001, p. 37) prescribes that, in order to obtain accreditation or remain accredited, each institution demonstrate that it fulfills the two core commitments (see p. 12 above). WASC notes:

[The] primary purpose [of the Educational Effectiveness Review] is to invite sustained engagement by the institution on the extent to which the institution fulfills its educational objectives. Through a process of inquiry and engagement, the Educational Effectiveness Review also is designed to enable the Commission to make a judgment about the extent that the institution fulfills its Core Commitment to Educational Effectiveness: *The institution evidences clear and appropriate educational objectives and design at the institutional and program levels, and employs processes of review, including the collection and use of data, that assure the delivery of programs and learner accomplishments at a level of performance appropriate for the degree or certificate awarded* (p. 44; emphasis in the original).

In this case, a participatory developmental process, if properly documented, could help demonstrate Patten's (a) commitment to proper design and (b) routine employment of a review process at the institutional and program levels. Also, by making design participants aware of (a) WASC's review objectives and (b) the apparent dictate for including data collection and use, the university begins the process of educating faculty and staff about the regulatory framework, thereby (a) furthering organizational and global awareness (CCL, 2002a, ¶ 4; Pritchard, 1999, p. 25), (b) helping other staff develop a business perspective (CCL, 2002a, ¶ 4; Wang, 2002, #21), and perhaps (c) inspiring commitment to certain activities (CCL, 2002a, ¶ 4).

An effective team approach (a) encourages teamwork (Public Service Commission of Canada, 2001, ¶ 8; Thorne, 2002, ¶ 11; Wang, 2002, #20) and partnering (Pritchard, 1999, p. 25; Public Service Commission of Canada, 2001, ¶ 9-10; Wang, 2002, #23), (b) promotes communication (CCL, 2002a, ¶ 4; Public Service Commission of Canada, 2001, ¶ 12; Thorne, 2002, ¶ 11; Wang, 2002, #1), and (c) helps forge synergy (CCL, 2002a, ¶ 4) and development of

interpersonal relationships (CCL, 2002a, ¶ 4; Public Service Commission of Canada, 2001, ¶ 11; Thorne, 2002, 11). The team approach provides an opportunity for managers and supervisors to give staff meaningful assignments that allow or encourage staff to (a) hone research skills (Wang, 2002, #4), (b) conduct needs assessments (Wang, 2002, #6), (c) increase self confidence (Public Service Commission of Canada, 2001, ¶ 16), (d) develop personally and professionally (CCL, 2002, ¶ 4; Thorne, 2002, ¶ 11), and (e) practice analytical thinking (Thorne, 2002, ¶ 11; Wang, 2002, #9-10).

Decision Analysis

Altier (1999, p. 43) also suggests a five-step approach to decision analysis:

1. Define the decision statement
2. Establish objectives
3. Value objectives
4. Generate alternatives
5. Compare and choose

Step 1: Define the Decision Statement

Altier (p. 44) indicates that the initial step in any decision analysis is to develop a formal decision statement because it "ultimately defines and controls every subsequent step." Because Patten has no existing online program, the decision analysis could be used to design and create one. Based on the previously stated givens and WASC core commitments, other appropriate elements of the definition include (a) clear purposes (e.g., Patten's mission) and (b) educational effectiveness. Patten's current marketing also focuses on offering an affordable education, and the given fiscal constraints suggest that a fiscal component might be appropriate to include.

Altier (p. 46) suggests that the word *best* or *optimum* should always appear in the purpose statement. Thus, a suitable concise purpose statement might be:

Develop the optimum affordable and effective online learning program that furthers the mission of Patten University.

This simple statement encourages discussion regarding what constitutes (a) affordable, (b) effective, and (c) what truly is the optimum program, while anchoring the effort tightly to the university's mission. It allows for the definition of affordable to change in the future. The statement also potentially defines a role for measuring effectiveness, once again allowing Patten to demonstrate one of the WASC-required core commitments, vis a vis "the collection and use of data [to] assure the delivery of programs and learner accomplishments at a level of performance appropriate for the degree or certificate awarded" (WASC, 2001, p. 44). Inclusion of an effectiveness measurement component also provides opportunities for (a) graduate researchers to conduct meaningful research in Patten's Education Division, (b) research results to be used to improve online programs, and (c) the effectiveness of any improvements to in turn be measured.

Step 2: Establish Objectives

Altier indicates that:

An objective is a specific, singular description of a desired *result* or output to be achieved or avoided, or a desired *resource* or input to be used or avoided

Objectives serve to define exactly and comprehensively what constitutes *optimum* or *best* in the decision maker's eyes; objectives should consider 360 degrees of the *system* embraced by the decision and surrounding and impinging on it

The relevant scope of the system encompassed by a decision can be defined as including anything—any area, any element—that has the potential of influencing the success or effectiveness of the results you're out to achieve—regardless of whether you have the ability to influence the area or element (pp. 50-51).

Thus, based on Altier, the objectives that are developed should cover all of the previously identified areas—the obvious ones being (a) the delivery system, (b) key support systems (administration, information technology, and library), and (c) faculty and student capabilities.

However, the phrase "consider 360 degrees of the system" (Altier, p. 50) suggests that Patten should not limit the scope of the objectives but should instead look for additional opportunities (a) within and (b) adjacent to the system. From a management and quality improvement perspective, Patten should develop objectives that address not only the start-up phases, but also sustaining the long-term improvement process. Sustaining long-term improvement includes (a) providing for development of existing and future staff, (b) creation and improvement of learning opportunities, and (c) improvement of the various support systems.

Altier (p. 51) suggest that two questions will aid in developing objectives:

1. What results or outputs do we want to achieve/to avoid in the area of _____?
2. What resources or inputs do we want to use/to avoid in the area of _____?

He also suggests that a checklist of thought provoking "trigger words" be used. For Patten, this objective-setting checklist might include the words listed in Table 5. Note that many of the *organization* trigger words listed by Altier (p. 52) apply not only to staff, but also to student customers, but often in a slightly different way. With respect to teams, for example, faculty and staff need to (a) function well in teams, (b) model teamwork, and (c) be able to teach about and promote teamwork, while students generally need to learn (a) about teamwork and (b) how to function as part of a team. Including a separate list relating to student customers enables staff to identify and address these potential differences.

For Patten, suitable objectives include, but are not limited to:

1. Maximum opportunities for students to learn.

Table 5

Draft objective-setting checklist

ENVIRONMENT	MARKETPLACE	CUSTOMERS	PRODUCT/SERVICE
1. Appearance	1. Competition	1. Adaptability	1. Appearance
2. Climate	2. Demand	2. Attitudes	2. Complexity
3. Legal	3. Demographics	3. Communication	3. Gaps
4. Political	4. Distribution	4. Compatibility	4. Liability
5. Regulatory	5. Elasticity	5. Conflict	5. Life cycle
6. Religious	6. Geography	6. Coordination	6. Maintenance
7. Social	7. Image	7. Development	7. Performance
	8. Market Share	8. Groups/Teams/Partners	8. Pricing
	9. Opportunities	9. Health	9. Proliferation
EQUIPMENT/FACILITIES	10. Position	10. Interests	10. Quality
1. Accessibility	11. Promotion	11. Initial Capabilities	11. Simplicity
2. Adaptability	12. Regulation	12. Interrelationships	12. Strengths
3. Capabilities	13. Risks	13. Knowledge	13. Weaknesses
4. Efficiency	14. Seasonality	14. Opportunities	
5. Interdependence	15. Segments	15. Performance	ORGANIZATION
6. Interoperability	16. Trade Barriers	16. Initial Qualifications	1. Adaptability
7. Life	17. Trends	17. Productivity	2. Attitudes
8. Location		18. Responsibilities	3. Communication
9. Replacement		19. Retention	4. Compatibility
10. Security	MATERIALS	20. Safety	5. Conflict
11. Size	1. Availability	21. Skills	6. Coordination
12. Storage	2. Configuration	22. Strengths	7. Development
13. Tolerances	3. Costs	23. Weaknesses	8. Flexibility
14. Utilization	4. Energy		9. Groups/Teams/Partners
15. Yield	5. Quality	METHODS/TECHNOLOGY	10. Health
	6. Scarcity	1. Adaptability	11. Interests
FINANCIAL/MONEY	7. Sources	2. By-products	12. Interrelationships
1. Availability	8. Substitutes	3. Innovation	13. Knowledge
2. Capital		4. Obsolescence	14. Mobility
3. Costs	TIME	5. Procedures	15. Opportunities
4. Liability	1. Cycles	6. Proprietary	16. Performance
5. Long/short Term	2. Deadlines	7. Security	17. Productivity
6. Return	3. Maximum	8. Waste	18. Responsibilities
7. Risk	4. Minimum		19. Safety
8. Sources	5. Schedule		20. Skills
9. Tuition Level			21. Strengths
10. Uses			22. Weaknesses

Modified after Altier (1999, p. 52)

2. Start offering online courses by Fall 2003.
3. Optimized fixed costs.
4. Maximum ability to serve evolving market niches.
5. Maximum potential to develop faculty.
6. Maximum potential to develop staff.
7. Maximum potential to develop students.
8. Maximum student retention.
9. Minimum online conflict.
10. Easy to use interface.
11. Single-stop customer service.
12. Does not confuse customers.
13. Enables customers to "save" partially completed work (e.g., applications for admission).
14. Promotes communication.
15. Facilitates communication.
16. Maintains accreditation.
17. Generates material to support continued accreditation.

With respect to item 3, while some staff might consider that minimizing costs should be an objective, the fact is that the quality of education might suffer if costs are minimized. For example, minimizing costs might result in not allocating funds for library purchases—an action that might be necessary in the short term but would severely limit learning opportunities if imposed long term. Also, prior identification of potential problems suggests that some objectives

(and, later, alternatives) could include or trigger development of (a) contingency plans, (b) policies, (c) procedures, and (d) preventive measures that lessen the likelihood of occurrence.

Step 3: Value Objectives

Altier (pp. 56-57) notes that some objectives may be more important than others may. In some cases (e.g., maintains accreditation) the objectives may be mandatory, while others (e.g., start date) might be desirable "wants." Altier suggests that it is appropriate to weight (on a 10-point scale) the "want" objectives.

Step 4: Generate Alternatives

After all objectives have been stated, classified as musts or wants, and proper weights assigned, the time has arrived to begin developing alternatives (p. 38). Altier (p. 39) cautions that decision makers should suppress any thoughts about alternatives prior to this point because doing so risks constructing a set of objectives that favors pet or familiar alternatives. To some extent, in Patten's case, this may already have occurred: when the Smith was contacted and requested to research possible learning management systems, two platforms (Blackboard and eCollege) were mentioned—one because the requestor had previously used the platform and the other because the university president had heard good reports about it. However, Smith attempted to evaluate all systems on their merits and suitability, establishing performance thresholds and listing various capabilities. Three systems (Blackboard, eCollege, VCampus) appeared best-suited for the task (Smith, 2003a).

Altier (pp. 59) suggests that alternatives logically fall into three modes: select, determine, and develop.

Select Mode Alternatives

The most obvious select alternative is "Select the optimum learning management system." Other select alternatives include:

1. Select the initial courses that will be offered online.
2. Select instructors to teach the first courses.
3. Select the first online students.

Determine Mode Alternatives

Altier (pp. 59-60) cautions that "determine" alternatives are difficult to develop because of there are so many possible variations. For example, what would be the best way to train potential online instructors? (a) Online? (b) Blended? (c) In a classroom? (d) Using in-house instructors? (e) Using vendor-supplied trainers? (f) Using a mix of instructors? (g) In a single session? (h) In a single week? (i) Over eight weeks? And so on. The variations seem endless. Rather than prejudge, a simple determine mode statement would be, "Determine the best way(s) to train potential online instructors." Other potential determine alternatives include, but are not limited to:

1. Determine the best way(s) to recruit new students.
2. Determine the best way(s) to recruit new faculty.
3. Determine the best way(s) to permit students to apply for financial aid.
4. Determine the best way(s) to interact with students regarding performance.
5. Determine the best way(s) to schedule online courses.
6. Determine the best way(s) to retain students.
7. Determine the best way(s) to develop staff.
8. Determine the best way(s) to maximize student participation.

Develop Mode Alternatives

"Develop mode" alternatives describe a new creation—something that hasn't previously existed. Altier notes, "By definition, this alternative should optimally conform to the objectives that have been defined; *they* are its design criteria" (p. 61). He suggests that the best approach is to first develop alternatives for the most important (10-weighted) objectives, then move down to 9-weighted objectives, and so forth. When lower-weighted objectives seemingly conflict with a previously designed element, Altier suggests looking for other ways to satisfy the lower-weighted objective or, if conflicts still cannot be resolved, to develop two or more alternatives that can be considered in *determine* mode.

For Patten's proposed program, there are numerous *develop* mode alternatives, including, but not limited to:

1. Develop an easy-to-navigate service portal.
2. Develop an effective method to assure that students have the (a) equipment, (b) aptitude, and (c) computer skills necessary to successfully complete an online course.
3. Develop ways to facilitate course development and/or conversion.
4. Develop methods to assure that processes required or implied by WASC are adequately documented.
5. Develop ways to preserve documents that are relevant to accreditation review.
6. Develop ways to expedite retrieval of documents that are relevant to accreditation review.
7. Develop ways to improve quality of individual programs.

Step 5: Compare and Choose

Altier (1999) describes a process for using the (a) objectives, (b) alternatives, and (c) weighting to reach a decision. His suggested process involves (a) creation of a *satisfaction scale* and (b) reflection on how well the various alternatives accomplish each objective. Development and application of such a scale (a) is beyond the scope of this paper and (b) requires a full suite of options. However, it is important to acknowledge the need to complete this step because it may afford additional leadership opportunities.

Role of Leadership in Decision Analysis

The preceding section (Decision Analysis) demonstrates some leadership competencies—especially analytical thinking (Thorne, 2002, ¶ 11; Wang, 2002, #9-10). However, once again, the single-person approach is flawed in that it misses several potential opportunities regarding (a) team formation, (b) staff education and development, and (c) demonstration of educational effectiveness, and risks alienation of various parties. By continuing the team approach suggested in *Role of Leadership in Situation Assessment* (p. 17 above), the leader reinforces the importance of (a) teamwork (Public Service Commission of Canada, 2001, ¶ 8; Thorne, 2002, ¶ 11; Wang, 2002, #20), (b) partnering (Pritchard, 1999, p. 25; Public Service Commission of Canada, 2001, ¶ 9-10; Wang, 2002, #20), and (c) communication (CCL, 2002a, ¶ 4; Public Service Commission of Canada, 2001, ¶ 12; Thorne, 2002, ¶ 11; Wang, 2002, #1). In addition, the team approach offers opportunities (a) for empowerment (CCL, 2002a, ¶ 4) as members are engaged in actual decision making, and (b) for members to practice and personally experience (a) judgment (CCL, 2002a, ¶ 4; Thorne, 2002, ¶ 11), (b) leading change (CCL, 2002a, ¶ 4), (c) influencing others (Pritchard, 1999, p. 25; Thorne, 2002, ¶ 11), (d) learning from experience (CCL, 2002a, ¶ 4), (e) negotiating (Thorne, 2002, ¶ 11), and (f) strategic planning (CCL, 2002a, ¶ 4). Through this

process, participants also gain valuable experience in (a) fostering and influencing a strategic vision (Thorne, 2002, ¶ 11), (b) selecting and using appropriate techniques (Wang, 2002, #8), (c) leveraging differences (CCL, 2002a, ¶ 4), and (d) motivating people (Thorne, 2002, ¶ 11).

Additional Considerations Regarding a Team Approach

As previously indicated, a team approach to situation assessment and decision analysis may benefit an institution such as Patten because it creates opportunities to (a) develop staff and (b) expand educational opportunities for students. For examples, students could become involved in (a) developing, administering, and analyzing effectiveness surveys; (b) documenting decision methods, processes, and results; and (c) improving services and programs. These activities could provide meaningful educational opportunities in (a) business and organizational management, (b) education, (c) computer science, (d) human resources development, (e) sociology, (f) communications, and (g) statistics. The results of student research could aid in demonstrating Patten's on-going commitment to educational effectiveness.

In addition, an overall team approach provides an excellent opportunity for a leader to (a) model effective leadership, (b) inspire a shared vision, (c) challenge the process, (d) enable others to act, and (f) encourage the heart—the five practices described by Kouzes and Posner (2002). It also provides opportunities for the leader to (a) clarify personal values to staff and customers; (b) set an example by aligning actions and shared values; (c) envision the future by imagining exciting and ennobling possibilities and communicating them to potential partners and staff; (d) enlist others in a common vision; (e) search for opportunities and innovative ways to change, grow, and improve; (f) experiment and take risks by constantly generating small wins and learning from mistakes; (g) foster collaboration by promoting cooperative goals and building trust; (h) strengthen others by sharing power and discretion; (i) recognize contributions by

showing appreciation for individual excellence, and (j) celebrate the values and victories by creating a spirit of community—all ten of the leadership commitments outlined by Kouzes and Posner.

However, it also is important for the leader to realize that the team approach requires considerable personal and institutional commitment. Staff will need to allocate time to complete the process. The leader will have to (a) encourage, (b) steer, (c) partner (Pritchard, 1999, p. 25; Public Service Commission of Canada, 2001, ¶ 9-10; Wang, 2002, #20), (d) adjust, (e) influence (Pritchard, 1999, p. 25; Thorne, 2002, ¶ 11), (f) delegate (Thorne, 2002, ¶ 11), (g) adapt (Thorne, 2002, ¶ 11), (h) further develop personal relationships (CCL, 2002a, ¶ 4; Public Service Commission of Canada, 2001, ¶ 11; Thorne, 2002, 11), (i) motivate people (Thorne, 2002, ¶ 11), and (j) generally participate in action management (Public Service Commission of Canada, 2001, ¶ 6).

If (a) resources for this planning process do not exist, (b) decision time is extremely short, or (c) staff resistance to the process makes failure likely, it might be best to restrict participation, at least until small successes begin to pique the interest of staff. The previous sentence helps demonstrate the thesis of this paper: that leadership ideally begins before (a) the project goal is announced, (b) the decision process is outlined, (c) the team composition is determined, and (d) the charge is delivered. For, if the leader fails to carefully consider any factor and later decides to significantly alter or abort the process and/or team composition, he or she risks (a) project failure and/or (b) alienation of staff who suddenly may feel (a) disempowered (CCL, 2002a, ¶ 4), (b) less confident, and (c) less credible. Such failure also risks harming interpersonal relationships (CCL, 2002a, ¶ 4; Public Service Commission of Canada, 2001, ¶ 11; Thorne, 2002, 11), and may cause participants to be less willing to (a) be

creative, (b) seek change, and (c) realize future potential opportunities. Similarly, if staff *truly* want to be involved in such processes, should the leader embark on a non-team or third-party approach, his or her decision might rightly or wrongly be interpreted as a vote of "no confidence" in current staff. Thus, the need exists to practice leadership before the planning process starts.

Summary and Conclusions

In higher education, success usually involves three elements: (a) providing a quality education to student customers, (b) assuring the financial health of the institution, and (c) complying with various regulatory requirements. Sustained success may also require innovation, including adoption and development of new approaches to education, to take advantage of new opportunities.

This paper describes two alternate ways—a one-person approach and a team approach—to decision making and outlines the many opportunities that the latter offers to develop the organization and model leadership. In essence, if successfully implemented, the process of leading helps improve leadership skills of the leader while simultaneously training new leaders. As previously noted, a team approach provides an excellent opportunity for a leader to (a) *model effective leadership*, (b) *inspire a shared vision*, (c) *challenge the process*, (d) *enable others to act*, and (e) *encourage the heart*—the five practices of leadership identified by Kouzes and Posner (2002). In the higher education example cited, the team approach also helps demonstrate the WASC-required commitment to educational excellence and, potentially, provides new and enhanced learning opportunities within several educational programs.

However, this paper also cautions that leaders must begin the leadership process before deciding on a one-person or team approach because a failed process, or selection of the wrong approach, risks negative impacts on (a) personnel and (b) the organization as a whole.

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