Mapping the Driving and Restraining Forces on Flexibility in Higher Education

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We begin with an observation made by Kay MacKeogh and Seamus Fox that truly describes us both:

As practitioners committed to the concept of flexible access to lifelong learning and with long experience of the impact such learning has on the lives of our students, we sometimes feel like those travellers of old who have returned from far-flung shores with tales of wondrous things over “there” that those who have stayed “here” refuse to believe.

But we refuse to be discouraged. We need to better understand where “here” is in our institutions. In the eleven preceding chapters, the authors have documented those forces that enhance efforts toward flexibility and those that stand in the way. We will use our own personal perspective on flexibility as a lens through which we view Kurt Lewin’s (1997) Force Field Analysis and the writings of our authors to map the socio-cultural and economic forces, institutional forces, and individual forces highlighted in the preceding chapters. Throughout the short summaries of these driving and restraining forces, we will briefly allude to how these forces change over time and influence each other, adding our personal thoughts and experiences on how to enhance our progress toward increasing flexibility in higher education. We’ll close with our perspective on what criteria we would use if asked to assess flexibility in an institution of higher education, criteria that you in turn might use to assess the flexibility in your institution.
DEFINING FLEXIBILITY IN HIGHER EDUCATION

Flexibility in the extreme could be described as anyone, any way, any time, anywhere, any flavour, any price, with no prerequisites, assignments, deadlines, or grades. In an ideal world, one could argue that more flexibility is better than less flexibility. However, in the real world, the challenge is to provide flexibility without too much complexity and chaos for students, faculty, and institutions.

How does one begin to define flexibility? We believe it must start with an understanding of the forces identified in the preceding chapters and with the culture of the institution, its faculty, and its students viewed in the context of larger societal influences. Any definition of flexibility should, we believe, be operational and situational. The biggest challenge is to define flexibility in the context of your own institution and specific set of circumstances and then use that definition to frame policies, procedures, and costing models that can be widely communicated, whether these pertain to students, faculty, or the institution itself. Arriving at the situational definition of flexibility should be a collaborative process, one that involves students, faculty, administrators, and funding agencies. A situational definition will help to ground the institution in reality, keep it from promising more than it can deliver, and help it to avoid marketplace seduction. This does not mean that situational definitions should be engraved in marble. They should continue to evolve and change as new technologies emerge, faculty attitudes change, and competitive forces bring new realities. There should always be room to stretch the vision.

Without a situational definition of flexibility grounded in the reality of a context, the concept remains ethereal and elusive. If flexibility is not clearly defined, then each faculty member, support staff, administrator, and student may operate from a different perspective and set of assumptions.

SOCIO-CULTURAL AND ECONOMIC FORCES

The key socio-cultural and economic forces enhancing and detracting from flexibility in higher education described by our authors are illustrated below. The relative strength of each of the forces varies among and between
the contexts; thus, the challenge for you is to reflect on your personal context, to add or subtract forces as applicable, and to assign relative strengths.

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**Socio-cultural and Economic Forces Driving Flexibility**
National priorities often push toward flexibility in higher education. These priorities may include engaging in social transformation, redressing past inequities of access to quality education, enhancing access to education, and ensuring the achievement of goals, often with the intent to drive the national economy and address labour-market demands. Related government priorities, policies, and funding initiatives ideally follow. Strong economic conditions provide the necessary capital to make these priorities a reality, with a vast digital infrastructure being yet another force to drive flexibility in higher education. When you have the money and the means, why not use it?

**Socio-cultural and Economic Forces Restraining Flexibility**
But there are also forces that restrain the push toward enhanced flexibility. The preceding chapters document the increased levels of complexity that new policies and related procedures bring. Unfunded priorities and unrevised mandates serve to maintain the status quo, as do national funding mechanisms and policies that advantage research over the kind of teaching that might extend the reach of higher education. High unemployment often leads to high demand for further education to retrain or re-career: it is a driving force, certainly, but it brings with it low government revenues, which impact negatively upon education, especially because initiatives are seen as increasing the demand for limited funds, including demands to enhance a limited digital infrastructure.
Finally, Latchem and Jung remind us that, regardless of resource levels, “some cultures also seem more ready to adapt and change than others.” As they point out, South Korea has been “exceedingly proactive in encouraging and supporting new cyber universities, university consortia, and e-learning, and, as a consequence, ‘virtual learning’ is entering the mass adoption stage.” In Japan, however, education reform and the “e-transformation” have been slow to arrive “because the openness, flexibility, and bottom-up approaches needed for these are incompatible both with the bureaucratic regulatory approaches of the Japanese government and with the hierarchical tendencies and opaqueness of the universities.”

Our Own Reflections: Socio-cultural and Economic Factors
Although not for want of trying, it has not proved easy to influence educational policy at the level of government. Here are some potentially useful tactics to consider:

• Have a champion in high places. It is a distinct advantage, as more than one of our authors has noted.
• In the absence of a champion, lobby legislators discretely by, for example, inviting them to tenth anniversary celebrations of pioneering degrees earned at a distance. If possible, hold these events in government buildings, with legislators’ constituents as prominent graduates and guests.
• Share research and personal success stories about how flexible higher education has changed lives, enhanced businesses, and impacted local economies through expanded access to education. Such information is critical to broadening the base of understanding and, hopefully, support, especially if that information is shared with those on powerful education committees that direct funding initiatives.
• The fact that taxpayers who foot the bill for state education should have access to its benefits is worth mentioning—a lot!
• Help legislators to see that because their support for the funding of flexible higher education directly and positively impacts their constituents, it could contribute to their re-election and is therefore worth the time and effort. Usually all this is not enough, but in rare cases it yields results—in our case, US$10 million in funding to
support a government initiative specifically for the development of additional baccalaureate degrees at a distance that would be accessible to all the citizens of the state of Wisconsin. Sadly, a hoped-for re-election to public office did not occur: the degrees, however, remain to this day!

**Institutional Forces**

Institutional forces, both driving and restraining, loom large as our authors try to negotiate for more flexibility in higher education. The driving forces emerging from our analysis and our experience are very obvious and compelling, but restraining forces seem almost overwhelming in their pervasiveness. Many of these restraining forces, however, have existed for a very long time and are showing signs of weakening. An innovative educator can negotiate change through the cracks that are appearing—like a drop of water turning to ice and widening the crack. And you do need ice in your veins to negotiate the institutional barriers to progress.

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**Institutional Forces Driving Flexibility**

A host of external and internal forces drive institutions toward flexible higher education. These include the socio-cultural and economic forces originating from government policies and funds as well as labour demands and digital infrastructures. But it all seems to start with a vision of institutional flexibility. Various rationales abound, from enhancing institutional
reputation to widening access to an often-unspoken intention of long-term institutional viability. Anticipated economies of scale—the ability to serve more students with less money, with the hope of generating excess revenue—has driven many an institution; some have been driven even to failure. Availability of funding is critical to support both course and faculty development and learner and technology support, but a degree of institutional suppleness is also required to drive operational changes toward flexibility.

A number of authors alluded to the importance of the desire of faculty and staff for a more flexible institution. Our authors suggest that with faculty experience and a willingness to develop and support others, we can move ever closer to our flexibility goal. Arrays of technology resources both within and outside the institution, including, for example, open-source online learning systems, can serve as drivers, but beware of a related driver—the belief in technological solutions. A systems perspective on flexibility is critical, and technology is but one component in a larger system of interacting parts.

The last institutional driver is learners who have needs and expectations, and may represent a more diverse population than some institutions are currently serving. More than one author asks, “Are we supple enough to meet these needs?”

Institutional Forces Restraining Flexibility
As you read the chapters in parts 2 and 3, we’re sure it came as no surprise that many of the restraining forces are repeated often in the narratives.

Some institutions fail to move in the direction of increased flexibility. Perhaps the very public failures of some are enough to discourage the faint of heart. Other authors suggest that the absence of growing institutional flexibility is the result of systemic rigidities in a culture that is resilient and ever-changing, and growing more so over time. Other institutions do move forward, but often with a vision imposed from the top, only partially relevant, obscure, poorly communicated, or all of the above. Couple these deficits with a reluctance to allocate funds to implement the vision—however clear, unclear, or contentious—and innovative changes in practice will not be forthcoming.

Additionally, ongoing fragmentation of efforts due to a lack of clear vision, competing demands within the institution, and a lack of incentives
or rewards (including merit pay, tenure, or promotion tied to flexibility initiatives) serve as strong restraining forces. The lack of institutional support for developing and teaching courses, the withholding of technology support for faculty, and issues surrounding course ownership and the potential use of course materials by others further restrain movement toward flexibility. Another emerging issue is a new model of instruction with more part-time instructors, especially in hard economic times. This model is more readily implemented with teaching and learning at a distance. Finally, as Darien Rossiter notes, “there is a degree of skepticism or wariness about an education and training environment that shifts the locus of control from teacher/instructor to student/learner.”

Our Own Reflections: Institutional Forces
From our experience at the 42,000-student, research-oriented University of Wisconsin–Madison (www.wisc.edu), extensive technology resources and employer/student demand for greater flexibility are not sufficient to make great strides in providing that flexibility. We soon discovered that just one flexible degree program could make a difference. The vision of one faculty member, a sound needs/market analysis that highlighted the needs of employers and students alike, existing competition, and a group of supportive faculty members, combined with a comprehensive business plan, enabled the College of Engineering to borrow money from central administration to develop a completely new online master’s program, complete with a new problem-based learner-centred pedagogical approach to learning, a new curriculum and courses, new delivery mechanisms, and so on. Instructional designers worked one on one with faculty to design the courses using appropriate technology selected on the basis of learning objectives and to teach the faculty members how to use the technology to teach online, all based on sound research from distance-learning experts on campus and around the world. Strong technical and student support was mounted, including the students’ first course entitled “Network Skills for Remote Learners,” a course designed to ensure learner success (mepp.engr.wisc.edu/Why_MEPP/Courses/NSRL.lasso). An evaluator rounded out the elements of this substantial and subversive push toward greater flexibility.

Using a creative band of faculty members, including ourselves, the faculty and staff had, in the face of scarce institutional support, met seven
challenging goals. They created a shared vision for flexibility in higher education for a small portion of the institution, they found loan funding in the face of reluctance to reallocate dollars to their efforts, and they defied systemic rigidities. They provided support for faculty and students within the emerging academic program that was not dependent on the larger institution, met employer and student demand for an appropriate education, and provided pre-agreed-upon rewards and incentives for the newly trained group of faculty members. Finally, by building on research and expertise across and beyond the institution, that creative band of faculty members built a program that had the potential to be a public success, not a public failure. Five national and international awards later, that seventh goal, public success, was certainly achieved.

Many lessons have been learned and put into place at the University of Wisconsin–Madison:

• Have a vision you can convey to others.
• Do your homework. Assess employer and learner demands, know your competition, and understand your unique academic niche. This is vital if you are seeking funding internally or externally through grants.
• Develop a sound business plan to sell the program internally or externally before, not after, you launch it. The plan should, for example, direct some profits to the unit for program enhancements, provide a foundation for additional degree development, and enable faculty to pursue professional development.
• Avoid duplication—co-operate when you can. For example, in implementing the “Network Skills for Remote Learners” course, some faculty, as well as support and technical staff, have been shared across degrees.
• Hire an evaluation expert with excellent academic credentials and distance-education experience and research to carefully assess the impact on students, their families, the faculty, students’ employers (subordinates and supervisors), and even the institutions that employed the program graduates. These results can be used to enhance the program and to increase understanding of the impact of making degrees convenient and accessible to diverse students.
• Share your evaluation results liberally in faculty colloquia, through individual consultations, and in demonstrations across the
institution and with administration, whether they ask for them or not. To date, several other online degree programs at the graduate level have emerged since that first one! Slow but sure progress has occurred—from the bottom up, in this case.

- Be prepared to defend everything, from technology choices to learner support. There will be pressure to use whatever is available at your institution. If an idea or strategy fits your curriculum, your pedagogy, your learners, your faculty, use it. If not, have your research in hand to defend your position.

- Never underestimate the power of the learners’ or employers’ voices. From our experience, even an individual course can develop a cadre of disciples willing to go forth and tell the world about the benefits of experiencing teaching and learning via flexible education. If you need them, call on them.

And, finally, enjoy the ride! You’re an agent of institutional change!

INDIVIDUAL FORCES

We focus here on the teacher and the learner as individuals. Both exert pressure on flexibility in higher education, as we shall see.

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<td>Faculty who have expertise in flexible teaching and learning</td>
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Individual Forces Driving Flexibility

Increasingly, a diverse array of learners is pushing for equity of access to higher education. These same learners are also beginning to demand flexibility. With the high cost of education and the current economic climate, the ability to take classes anytime, anywhere is critical for those who need to work to pay the rising costs of tuition, and this includes our traditional undergraduate student. Adult students, already working but highly motivated to make their educational dreams a reality, also push for equity of access to education regardless of circumstance. Highly motivated and possessing clear learning goals, these adults also desire more flexibility in pedagogical approaches that move from a more teacher-centred to a more learner-centred approach.

But learners are not the only ones pressing for flexibility. Faculty have become a force for equity of access and are motivated to explore means to address the challenges to flexibility in teaching and learning that they face in their institutional context. A grassroots force for flexibility in higher education is emerging, as Cathy Gunn notes. Combine this group of motivated faculty with others who have the expertise and experience needed to enhance flexibility in teaching and learning, and we are truly pressing for change. But as Darien Rossiter suggests, “How we change, how we think about flexible learning and what ‘student-centred’ means in new electronic environments and within our dual-culture context, will influence how successfully we are able to embed the best of flexible and e-learning into our learning and teaching philosophy and practice.”

Individual Forces Restraining Flexibility

But once again, individual forces restrain progress toward increased flexibility. Learners at a distance are often multi-tasking—balancing work, family, and leisure—and thus are time-poor, but have high expectations, nonetheless. Face-to-face instruction with a teacher-centred pedagogy is decidedly advantageous for students who just want the teacher to tell them what is needed and how to get there. Expeditious studies are key in such circumstances. While perhaps not a direct force restraining flexibility, these learner characteristics have a decided influence on the attitudes and beliefs of some faculty, as we shall see.
Fear of change is an attribute shared by many of our colleagues in higher education (as many of the authors of this book point out). Add to that issue a perception that students have limited time and energy to devote to their studies, insufficient competence and confidence to study the content at a distance with technology, and a commitment to goals more credential-oriented than learning-oriented, and skepticism emerges. Several authors note that access to technology, the capability of the technology being used, and individual competence with technology not only continue to differentiate students but also serve as a barrier to flexibility in higher education offered through digital technologies. Sadly, some of the fear emerges from similar shortcomings in faculty members themselves. Andy Lane asks, “So are we asking the wrong question? Is openness really part of flexibility, and is flexibility only suitable for the sophisticated learner and/or teacher because it requires confidence and competence? Do most people still like the comfort and safety provided by existing, less flexible, educational provision because someone else does the scaffolding work to make sense of an often complex and messy business such as education?”

Certain learner characteristics and competence levels cause ongoing frustration for faculty and, according to their accounts, restrict their ability to teach at their traditional levels of quality. Furthermore, they feel concern about the impact on quality of lack of funding for flexible education. Hidden beneath all these issues lies a fear of losing not only their intellectual property but also their jobs in an era of increasingly casualized academic employment.

And finally, as Yoni Ryan laments, if only flexible learning had been understood as “a pedagogical approach that was learner-centred and built on students’ experiences, and not simply a technological fix to accommodate learners who were increasingly impatient with the rigidities of university processes and ‘delivery by lecture,’ flexibility might have been achieved within the decade.” Such is the value of hindsight but also the value of learning from the experience of others!

**Our Own Reflections: Individual Forces**

So what does our experience tell us? We concur with what Mary Simpson and Bill Anderson have articulated:
First, we must be mindful of the value and role of research in innovative practice. Innovations that aim to break the traditional transmission model moulds must be rooted in a solid understanding of past research; they must be evaluated rigorously and systematically, and the results disseminated. Second, teamwork is all. It gives us a fighting chance to anticipate and creatively overcome the obstacles to progress. . . . The third lesson is that our progress toward consistently flexible higher education is slow and challenging.

Our lessons here are quite practical:

- Research your practice. If you need research to achieve tenure, salary increases, recognition, and so on, conduct quality research on your teaching and publish it. Also, find lots of opportunities to share it among the faculty and administration.
- Have a strong grasp of current quality research on technology-based teaching in your area of expertise and that of others in your department, if possible.
- Share it liberally!
- This grasp of current research and even historic research will come in handy when you volunteer to serve on institution-wide committees exploring teaching and learning with new technologies. Yes, you must volunteer, or those skeptics will share their misunderstandings to such an extent that they will become codified.
- Team teach. While it may be an additional burden to team teach a course using technology to learners at a distance, the time is well spent when you consider that yet another course is now accessible to learners and another colleague is less fearful of change, has some modicum of expertise, sees flexible learning as something other than a technological solution, and, hopefully, has seen new models of teaching and learning in action, models that lead to quality learning outcomes. You will also have another team member to help you make progress on adding flexibility to a curriculum.
- Team up on research and/or evaluation projects related to flexible higher education or to projects moving forward with innovative solutions to add flexibility, even if they are in a different academic
The time we have both spent working with our colleagues in engineering and nursing—sharing hopes, dreams, research, and lessons learned, designing learner support writ large, teaching “network skills,” and so on—has been invaluable. It has been a win-win situation. We get to talk about something we know and love, learn what they have discovered, and share good times with colleagues who share our vision. Not many share our vision of flexibility in higher education, so we need to find them, wherever they are hiding, to help us all become a force to be reckoned with.

- Another force to be reckoned with is students. Ensure their success. Students who have found success in a flexible program in higher education, a program that they could not have accessed otherwise, are walking marketing tools and a force for change.

Sadly, you can do little to speed up the progress of flexibility in higher education other than nibble away at the edges of the forces that slow down progress. And we repeat—participate on those committees exploring flexible alternatives although it may be the fifth such committee you’ve served on. Eventually, you’ll wear them down!

**Assessing Flexibility in Higher Education**

So where do we need to direct our efforts to enhance flexibility in higher education? We have highlighted a number of forces that drive and restrain efforts to achieve more flexibility in higher education. The strengths of each are highly variable because they are based on the specific context in which they occur. And we recognize that as we exert pressure on one force or eliminate another, other forces may emerge. Such is the adventure of change in higher education.

We have observed distance education and higher education in the international arena for a combined total of over sixty years; we have served on national and international boards, review panels, and accrediting bodies; and we have interacted with thousands of practitioners and scholars from around the world at the Wisconsin Distance Education Conference over the past twenty-five years. Based on those experiences,
we conclude by sharing our criteria for the evaluation of flexibility in an institution of higher education. Here are a few questions we might ask if we came to your institution to assess its flexibility:

1. Have the mandates imposed by legislative and accrediting bodies been reviewed?
2. Does the institution use a collaborative planning process that involves students, faculty, staff, administration, and funding agencies?
3. Has a written institutional situation analysis of socio-cultural, economic, institutional, and individual forces been prepared?
4. Does the institution have an operational/situational definition of flexibility?
5. How does the mission statement address flexibility?
6. Do policies, procedures, and business models support flexibility?
7. Is capacity building provided in the following three areas to support the mission statement and the operational definition of flexibility?
   a. Faculty and staff development
   b. Learner education and support
   c. Technology support and staff development
8. Are curricula and teaching and learning strategies sufficiently supple to provide flexibility for the diverse learner population?
9. Is assessment and evaluation ongoing for continuous quality improvement?
10. Are accountability measures, rewards, and incentives in line with strategic initiatives?

CLOSING THOUGHT

When all else fails, remember Cathy Gunn’s observation:

The same flexibility that is demanded for learning environments slowly filters through to organizational structures and systems that support such flexibility. Concepts of power and leadership are gradually shifting from individual to collaborative models. Such a culture shift is significant for future developments. Even though people and organizations
generally resist it, over time change is inevitable and finds its own equilibrium. One impact of new technology and the social change associated with it is a shifting locus of control in various parts of formal education systems. Regardless of politics, evolving pedagogy will persist as a significant driver.

Hope springs eternal.

REFERENCE


ABOUT THE AUTHORS

Seldom does an “F” inspire a career, but such was the case for Chère Campbell Gibson. A serendipitous opportunity to design distance degrees in the late 1970s brought back memories of the distance-education course she once failed. A lifelong advocate for learner support was born! For over twenty-five years, as a faculty member at the University of Wisconsin–Madison, she focused her research, teaching, and outreach on distance education. She has helped to launch numerous undergraduate and graduate degrees at a distance as well as non-credit programs for professional development in distance education for both pre- and post-retirement learners. Committed to equity of access to education, she never ceases to regale administrators and faculty colleagues alike with the benefits of flexibility in higher education. http://webpages.charter.net/gibsoncommunications/Gibson%20Communications.htm

During his college years, Terry Gibson worked with instructional television and realized that there was more to distance education than just putting a classroom on television. In his graduate education, he sought to better understand the design of instruction for distance education in undergraduate, graduate, and continuing education contexts.
Throughout his career in the United States in higher education, he has worked as an instructional designer, teacher, administrator, and scholar to improve the quality of distance education. He is the founder of the Wisconsin Distance Education Conference, which is now in its twenty-sixth year and each year brings together more than a thousand distance-education practitioners, scholars, and administrators from around the world. He is currently Professor Emeritus in the School of Human Ecology at the University of Wisconsin–Madison. http://webpages.charter.net/gibsoncommunications/Gibson%20Communications.htm