



The Institutionalization of Distance Education in Public Higher Education Institutions: The UFScar Case*

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Luciane Penteadó Chaquime**  

Daniel Mill***  

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Abstract

This research article examines the institutionalization of Distance Education (DE) at the Federal University of São Carlos (UFScar), emphasizing the institutional management strategies and partnerships that enabled the integration of DE into the university structure. Based on a doctoral thesis, the study adopts a qualitative approach, using documentary analysis and semi-structured interviews to understand the interactions between UFScar and the higher education field through the lens of Institutional Theory. The results indicate that the partnership between the Open University of Brazil System (UAB) and UFScar fostered the creation of specific organizational structures, such as the Secretariat for Distance Education (SDE), and the gradual incorporation of DE into the university's strategic vision. However, challenges remain, including financial dependence on government funding calls, resistance from some faculty members to the modality, and the ongoing need for pedagogical innovation. It is therefore recommended that UFScar, continue developing strategies to overcome this resistance and further institutionalize distance learning, promoting accessible education with a socially referenced standard of quality.

Keywords

distance education; strategic planning; public higher education; open universities; college administration

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** PhD in Education. EBTU Lecturer at the Federal Institute of Education, Science and Technology of São Paulo (IFSP) – Matão Campus, Brazil. lupenteadó@ifsp.edu.br

*** PhD in Education. Full Professor at the Federal University of São Carlos (UFScar) – São Carlos/SP Campus, Brazil. mill@ufscar.br

A institucionalização da educação a distância nas instituições públicas de ensino superior: o caso da UFSCar

Resumo

Este artigo analisa a institucionalização da Educação a Distância (EaD) na Universidade Federal de São Carlos (UFSCar), enfatizando as estratégias de gestão institucional e parcerias que permitiram a incorporação da EaD à estrutura universitária. Fruto de uma tese de doutorado, a pesquisa adota a abordagem qualitativa, utilizando análise documental e entrevistas semiestruturadas para compreender as interações entre a UFSCar e o campo da educação superior à luz da Teoria Institucional. Os resultados indicam que a parceria firmada entre o Sistema Universidade Aberta do Brasil (UAB) e a UFSCar impulsionou a criação de estruturas organizacionais específicas, como a Secretaria de Educação a Distância (SEAD), bem como a incorporação progressiva da EaD na visão estratégica institucional. No entanto, desafios permanecem, incluindo a dependência financeira dos editais governamentais, a resistência de alguns professores em aceitar a modalidade e a necessidade de inovação pedagógica contínua. Portanto, sugere-se que a UFSCar continue desenvolvendo estratégias para superar essa resistência e institucionalizar a EaD, promovendo educação acessível e de qualidade socialmente referenciada.

Palavras-chave

educação a distância; planejamento estratégico; educação superior pública; universidades abertas; administração da faculdade

La institucionalización de la educación a distancia en las instituciones públicas de educación superior: el caso de la UFSCar

Resumen

Este artículo de investigación examina el proceso de institucionalización de la Educación a Distancia (EaD) en la Universidad Federal de São Carlos (UFSCar), destacando las estrategias de gestión institucional y alianzas que permitieron la incorporación de la EaD en la estructura universitaria. Basado en una tesis doctoral, el estudio adopta un enfoque cualitativo y utiliza análisis documental y entrevistas semiestructuradas para comprender las interacciones entre la UFSCar y el campo de la educación superior desde la perspectiva de la Teoría Institucional. Los resultados indican que la asociación entre el Sistema Universitario Abierto de Brasil (UAB) y la UFSCar impulsó la creación de estructuras organizacionales específicas, como la Secretaría de Educación a Distancia (SEAD), así como la progresiva incorporación de la EaD en la visión estratégica de la universidad. Sin embargo, persisten desafíos, entre ellos la dependencia financiera de convocatorias gubernamentales, la resistencia de parte del profesorado a la modalidad y la necesidad constante de innovación pedagógica. Se recomienda, por lo tanto, que la UFSCar continúe desarrollando estrategias para superar estas resistencias y profundizar la institucionalización de la educación a distancia, promoviendo una educación accesible con un estándar de calidad socialmente referenciado.

Palabras clave

educación a distancia; planificación estratégica; educación superior pública; universidades abiertas; gestión universitaria

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Introduction

Distance Education (DE) has become increasingly relevant in higher education thanks to advances in the internet and Digital Information and Communication Technologies (DICT), enabling a growing demand for more flexible and democratic access to education. The DE modality thus emerges as a key instrument for reaching students in remote regions or those with time constraints that prevent them from attending in-person classes.

The institutionalization of DE at the Federal University of São Carlos (UFSCar) represents a dynamic process of adaptation to the pressures exerted by the higher education field in Brazil to incorporate this modality. The formal institutional trajectory of DE in undergraduate courses began in 2006 with UFSCar's participation in the Open University of Brazil System (UAB). This partnership led to the offering of five distance undergraduate courses, motivating UFSCar to create a Secretariat for Distance Education (SDE) and develop strategic management plans to systematically incorporate DE into its organizational structure.

In this context, this article aims to analyze the institutionalization of DE at UFSCar, emphasizing the management strategies and partnerships that enabled its incorporation, even if partially, into the university's structure. To do so, the article examines the pressures within the higher education field that influenced UFSCar, the negotiations that led to the establishment of the partnership between the university and the Ministry of Education (MEC) for offering courses through the UAB System, and the adaptation of its Institutional Development Plans (IDP) and Management Plans to include DE. The analysis sheds light on UFSCar's initial actions to integrate the modality into its organizational structure, addressing the challenges and advancements of this process, as well as future perspectives for DE at the institution.

The Integration of Distance Education in Brazilian Public Universities from the Perspective of Institutional Theory

Institutionalization is a key concept in organizational studies, as it provides elements for understanding how organizations adapt to the pressures and opportunities of their environments. Like Seidler *et al.* (2023), we consider that Institutional Theory, particularly in its sociological strand, has been fundamental for comprehending this process, offering concepts such as isomorphism, organizational field, and legitimacy.

Philip Selznick, a pioneer of Institutional Theory, argued that organizations evolve from technical structures to institutions as they internalize values and norms that transcend their original functionality (Carvalho *et al.*, 1999; Fachin & Mendonça, 2003). This process, known as institutionalization, occurs when an organization adapts its practices and objectives in response to external pressures and its particular history. Accordingly, the organization, defined by the author as “a technical instrument for mobilizing human energies toward an established purpose” (Selznick, 1971, p. 5), experiences not only technical pressures but also symbolic ones, both from its internal organizational environment and from the external environment. In adaptive response to these pressures, organizations create internal structures, norms, rites, and values (Selznick, 1996).

Authors such as Meyer and Rowan, and DiMaggio and Powell, by expanding Institutional Theory, argue that organizations seek to incorporate institutionalized practices to gain legitimacy within the organizational field. It is important to note that an organizational field is a network of interconnected organizations—such as suppliers, consumers, regulatory agencies, and competitors—that share values, norms, and objectives (DiMaggio & Powell, 2005). In the context of higher education, this field includes universities, regulatory bodies such as the Ministry of Education (MEC), funding institutions, professional associations, and other stakeholders.

Given the adaptive nature of organizations and the influence of the social context on decision-making processes, the organizational field is characterized by norms and symbolic expectations that organizations must meet, regardless of their technical efficiency (Meyer & Rowan, 1999; Scott & Meyer, 1999). Organizations, therefore—under pressure from coercive, normative, or mimetic instruments used by the field in which they are embedded (DiMaggio & Powell, 2005)—adopt practices to appear responsible, modern, and appropriate, ensuring their legitimacy, which leads to the phenomenon of institutional isomorphism (DiMaggio & Powell, 2005; Meyer & Rowan, 1999).

The dynamic interaction between an organization and its field, when analyzed from an endogenous perspective—that is, focusing on internal structural arrangements of the organization—is procedural and continuous, passing through the phases of habituation and objectification before becoming sedimented (Tolbert & Zucker, 1999). Thus, habituation occurs when new organizational arrangements emerge to solve problems. Objectification is the stage in which practices are disseminated and accepted, gaining consensus and legitimacy within the organization. Finally, sedimentation happens when structures are maintained over time, becoming an integral part of the organization.

Studies indicate that the institutionalization of DE in Brazilian universities reflects social, political, and economic pressures (Chaquime, 2019; Ferreira &

Carneiro, 2015; Ferreira & Mill, 2014; Mill & Veloso, 2021) within higher education. The National Education Guidelines and Framework Law (LDB) (Law No. 9.394, 1996) and Decree No. 5.622 (2005) established the foundations for DE to be formally recognized and regulated, stimulating its availability and consolidating it as a legitimate and relevant modality (Mill, 2018). The creation of the UAB System in 2006 (Decree No. 5.800, 2006b) further boosted its integration, encouraging public universities to offer distance learning courses, primarily aimed at teacher training (Mill, 2012). Thus, partnerships between universities and the UAB System would represent a coercive isomorphic mechanism, that is, resulting from legal and regulatory pressures that impose standards and guidelines influencing the integration of DE in Public Higher Education Institutions (PHEIS) (Arruda, 2018; Ferreira & Carneiro, 2015).

From an endogenous perspective, studies indicate challenges arising from the significant difference between traditional in-person education models and the spatiotemporal flexibility of the distance modality. Institutions have had to create structures and practices to manage, support, and assess DE programs with quality comparable to in-person ones. This required organizational and administrative reconfiguration, such as the creation of specific DE units (e.g., DE Centers or Secretariats) to handle administrative, financial, and pedagogical matters within the institution.

Studies such as those by Veloso and Mill (2022) show that the integration of DE in universities undergoes a process of negotiation and internal adaptation, marked by resistance—mainly due to prejudices against the modality and fears regarding changes in teaching roles, structures, and workflows. Additionally, Cardona-Mejía *et al.* (2023) explain that resistance to change within an organization can involve organizational aspects, such as lack of experience, power dynamics, and political-cultural factors, as well as individual behaviors, attitudes, thoughts, and feelings, including lack of motivation and distrust. Accordingly, Nascimento and Vieira (2016) highlight the need for cultural changes within universities for DE to be fully integrated.

According to Institutional Theory, the consolidation of a new structural arrangement requires a consensus on its effectiveness and necessity, which provides it with temporal sustainability by minimizing resistance in light of the identification of positive impacts (Tolbert & Zucker, 1999).

It is important to highlight that the integration of DE in public universities has brought significant implications for pedagogical practices. Mill (2014) describes the need for a multiteacher approach, in which professors, tutors, and technicians work together to ensure the effectiveness of the teaching-learning process. The adoption of digital technologies, virtual learning environments, and innovative teaching strategies was also essential for institutions to adapt to the DE modality.

Furthermore, the integration of DE entails restructuring financing models, as this modality involves specific costs, such as the production of digital teaching materials and the maintenance of in-person support centers.

Thus, the integration of DE in Brazilian universities is not just a technical issue; it involves cultural, organizational, and pedagogical changes. Institutionalization—, understood as occurring to varying degrees—follows a progressive path toward the systemic incorporation of the DE modality into the administrative and organizational structure of Public Higher Education Institutions (Ferreira & Mill, 2014; Mill & Veloso, 2021). According to literature in the field, the degree of institutionalization can be measured by indicators such as overcoming internal resistance, adapting administrative and pedagogical practices, and promoting a mindset that understands DE as an integral part of the university environment, providing accessible education with socially referenced quality.

In the next section, we present the methodological approach adopted in the investigation to support the analysis and discussions.

Methodological paths

This article is based on a doctoral research study (Chaquime, 2019), which adopted a qualitative approach (Bogdan & Biklen, 1994) to analyze the institutionalization of DE at UFSCar. The study examines how the university incorporated the distance learning modality into its organizational structure, using document analysis¹ and semi-structured interviews.

The document analysis involved a detailed examination of reports, internal policies, regulations, ordinances, resolutions, meeting minutes, and other institutional documents produced by UFSCar and SDE-UFSCar. These documents provide insights into the strategies, practical actions, and challenges faced in the planning, implementation, and evolution of DE within the university's structure and culture.

To complement the document analysis, semi-structured interviews were conducted² with coordinators of undergraduate and specialization courses offered by UAB-UFSCar, as well as managers responsible for DE at UFSCar—specifically from UAB-UFSCar and SDE-UFSCar—along with a university

¹ The doctoral research focused on the institutionalization of distance education at UFSCar from 2004 to 2018; therefore, the documents initially analyzed covered this period. For the purpose of writing this article, however, the documentary research was extended and included recent documents with a view to shedding light on the impacts of the pandemic, as well as the future directions of distance education at the university.

² The interviews were conducted for doctoral research and, therefore, will not be used in the triangulation of analyses involving documents published after 2018.

administrator. The interviews followed a pre-established script but allowed flexibility to explore relevant topics in greater depth.

The documentary data and interview transcripts were organized, categorized, and analyzed according to the principles of Institutional Theory, exploring how external pressures from the higher education field and internal adaptations at UFSCar contributed to the institutionalization of DE.

Methodological triangulation thus enriched the understanding of DE incorporation strategies and the complex interactions between the university and the higher education field, particularly during the initial phase of the process at UFSCar.

The Federal University of São Carlos and the Higher Education Field: A Focus on Distance Education

Founded in 1968 during Brazil's military dictatorship, the Federal University of São Carlos (UFSCar) initially oriented its actions towards political and business interests rather than broadly reflecting societal demands. However, from its inception, the university distinguished itself through a multidisciplinary approach, prioritizing research development, offering extension courses linked to the industrial sector, and training highly qualified professionals, especially in master's and doctoral programs, including teacher training in basic sciences for secondary and higher education levels (Universidade Federal de São Carlos [UFSCar], 2004).

Until 1978, its policies were determined by an external Board of Trustees. Since then, UFSCar has undergone resistance movements that resulted in the implementation of higher collegiate bodies, establishing a decentralized structure aimed at promoting consensual decision-making processes based on the involvement of the academic community (Hardy & Fachin, 2000; UFSCar, 2004).

Since 1992, UFSCar has incorporated public administration and strategic planning practices to design, monitor, and evaluate its management processes (UFSCar, 2004, 2013b). Key instruments in this regard include the Institutional Development Plan (IDP), the Management Plan, and sectoral plans (UFSCar, 2014a).

From the perspective of Institutional Theory, the development of the IDP serves as a mechanism through which the university seeks legitimacy within the higher education field by demonstrating compliance with current regulations. This is particularly relevant because the IDP is a legal requirement established by Law No. 10.861 (2004), which created the National Higher Education Evaluation System (SINAES) and mandates that higher education institutions develop such

plans to be assessed and maintain accreditation with the Ministry of Education (MEC).

The Management Plan, as a document derived from the IDP, serves as a guiding framework for administrators and parts of the rectorate, aiming for efficiency and effectiveness. It details tasks, responsibilities, and deadlines, providing tools to monitor planned actions and operations (UFSCar, 2010a).

Because they represent the academic community's consensus regarding the demands and values of the education field—particularly regarding DE—the following analysis will focus on UFSCar's IDPs for the periods 2004-2008 and 2013-2017, as well as the Management Plans for 2008-2012 and 2012-2016, to highlight the institutional guidelines related to the institutionalization of DE at UFSCar. Additionally, we examine the university's initial adaptations to create the necessary structures for DE following its partnership with the Open University Brazilian System (UAB).

Distance Education in the IDP 2004-2008 and the Management Plan 2008-2012

In 2002, development began on the Institutional Development Plan (IDP) for the 2004-2008 period, aiming to position the university as a pioneer in knowledge production and professional training within an evolving landscape. The plan sought to foster competent and critical engagement in scientific and technological development, while maintaining a commitment to democratic values and social responsibility (UFSCar, 2004, 2013b).

To reconcile goals imposed by the higher education field with the institutional mission, UFSCar's IDP 2004-2008 outlined guiding principles that express the university's core values and guide its actions: academic excellence, societal, free public education, the inseparability of research and outreach, free access to knowledge, commitment to democratic values and citizenship, participatory and transparent management, environmental sustainability, appreciation of full-time dedication, and integration into the national education system (UFSCar, 2004). The last principle highlights UFSCar's pursuit of legitimacy within the Brazilian educational context.

Hardy and Fachin (2000) emphasize that public universities experience strong environmental pressures, primarily due to government intervention and resource scarcity. This influence is evident in the definition of research agendas. According to the IDP 2004-2008, "funding agencies, through their financial capacity, have strongly influenced the decisions of UFSCar's faculty and research groups since the 1980s" (UFSCar, 2004, p. 30). The document also states that the university legitimizes itself by being recognized "among the best in the country"

(UFSCar, 2004, p. 30), according to government indicators that assess research quality and productivity. In addition, a specific management guideline at UFSCar is to seek “new forms of resource mobilization for the university, in line with its public nature and the democratization of access” (UFSCar, 2004, p. 35).

These principles are operationalized through general and specific guidelines that direct institutional planning during the validity period of the IDP. Within the context of this study, one key general guideline of IDP 2004-2008 is highlighted: “promote and encourage the inclusion of digital methodology at all levels of the institution” (UFSCar, 2004, p. 23). Additionally, a specific guideline states: “define and implement a policy for distance education at UFSCar” (UFSCar, 2004, p. 27). This indicates that DE was already within the university’s strategic horizon, although it was initially developed by technology-related sectors, such as the Secretariat for Informatics (Sin).

From 2008 to 2012, UFSCar guided its activities through a Management Plan structured around objectives and operations, organized into thematic axes and sub-axes. The axes were defined based on the IDP guidelines and the Rectorate Management Program, while the sub-axes emerged from internal discussions aimed at detailing the operations and actions to be carried out during the period (UFSCar, 2010a).

In the analysis of the plan, references to the implementation of DE were identified in axes 1, 3, and 9. Table 1 presents the corresponding axes, sub-axes, and operations addressing DE during the 2008-2012 period.

Table 1
Distance Education in the UFSCar Management Plan for 2008 to 2012

Axes	Subaxes	Operations
<p>Axis 1. Training processes in different modalities of education</p>	<p>Teaching and learning processes in different modalities</p>	<ul style="list-style-type: none"> • <i>Operation 1.1: Institutionalization of undergraduate courses offered in the distance learning modality</i> • <i>Operation 1.5: Consolidation and improvement of processes and ProGradWeb and Nexos systems, in accordance with the demands arising from UFSCar’s growth</i> • <i>Operation 1.6: Strong investment in the development of course coordination for different modalities</i> • <i>Operation 1.7: Institutionalization of the Management of Curricular Internships (mandatory or not) considering the different teaching modalities</i> • <i>Operation 1.8: Monitoring teaching and learning processes in different courses and teaching modalities</i>

Axes	Subaxes	Operations
	Distance learning references	<ul style="list-style-type: none"> • Operation 1.15: Design of references for offering courses and disciplines in the distance learning modality at UFSCar • Operation 1.16: Definition of pedagogical guidelines for distance learning courses and activities offered in the DE modality
	Continued training of teaching staff and technical support staff for teaching activities, carried out in person and remotely	<ul style="list-style-type: none"> • Operation 1.17: Promotion of ongoing training for UFSCar faculty and administrative staff, both in-person and non-in-person, with a view to improving undergraduate education in its different modalities, taking into account the new demands of the contemporary university
Axis 3. Evaluation processes	There is no division into subaxes in this case	<ul style="list-style-type: none"> • Operation 3.2: Continuous evaluation of UFSCar's distance learning frameworks • Operation 3.3: Continuous assessment of teaching-learning processes in different courses and teaching modalities
Axis 9. Management of physical space, infrastructure and environment	Planning and design of physical space and infrastructure	<ul style="list-style-type: none"> • Operation 9.1: Strengthening and adapting the administrative structures of sectors such as CEMA, DICA, EDF, EdUFSCar, PROACE, SDE and SST

Source: Adapted from *UFSCar Management Plan 2008-2012*, from UFSCar, 2010a. Note: Only results related to distance learning were considered.

Based on Table 1, it is observed that UFSCar's Management Plan for 2008-2012 established a set of objectives and actions to institutionalize DE within the university. However, certain aspects deserve special attention. Right in the first axis, it becomes clear that the institutionalization of DE is part of UFSCar's strategic horizon, with planned actions to ensure the financial sustainability of DE through resource mobilization, mainly for specialization and professional development courses (Chaquime, 2019).

Operation 1.6 (Axis 1) is particularly significant, as it addresses the recognition of faculty effort, which is one of the main challenges of DE institutionalization (Nascimento & Vieira, 2016) and has not yet been fully resolved at UFSCar, as revealed by research data (Chaquime, 2019).

The DE Referential sub-axis (Axis 1) includes internal regulatory actions that aim to equate DE with in-person education in normative terms. Operation 1.16 focuses on strengthening scientific research related to the topic, which has indeed advanced and was recognized by interview participants as a positive outcome of the institutionalization of DE.

Overall, UFSCar's 2008-2012 Management Plan contains important elements for consolidating the institutionalization of DE within the university. However, changes imposed by the higher education field will require new strategies from the institution, impacting the integration of this modality. Chaquime (2019) provides a more detailed overview of the elements in this Management Plan, including actions that demonstrate the institutional commitment to DE.

Distance Education in IDP 2013-2017 and in the Management Plan 2012-2016

The Institutional Development Plan (IDP) 2013-2017 of UFSCar was formulated in accordance with *Decree No. 5.773* (2006) and *Law No. 10.861* (2004), which regulate the functions of regulation, supervision, and evaluation of Higher Education Institutions (HEIs). The plan includes the Institutional Pedagogical Project (IPP), which presents "the guiding principles of policies for teaching, research, extension, and academic management activities" (UFSCar, 2013b, p. 12).

Within the IPP's guidelines for training processes, challenging issues related to DE emerged, such as ensuring quality when equating distance courses with in-person ones, integrating DE students into university activities, and fostering productive articulation between face-to-face and distance teaching-learning processes—concerns likely stemming from institutional experience offering undergraduate courses through the UAB System (UFSCar, 2013b). These issues reveal the complexity of systematically incorporating the DE modality, especially in institutions traditionally focused on in-person education, such as UAB System partners. They also reflect UFSCar's commitment to maintaining quality standards in its distance learning programs.

Regarding the institutionalization of DE, the analysis of the 2013-2017 IDP highlights, among the general guidelines for academic activities development, a concern with incorporating the distance modality. Notable references to DE appear in discussions on the inseparability of teaching, research, and extension; the expansion of student enrollment; and the establishment and application of quality benchmarks. Furthermore, institutional sensitivity to technological innovations and policies that expand access to higher education is evident, demonstrating the university's recognition that adult education can occur at different times and spaces, making DE a viable training alternative (UFSCar, 2013b).

In the section of the document specifically addressing institutional policies for research and extension, the analysis clearly showed UFSCar's concern with ensuring that students in distance-learning programs can participate in these activities, as is expected of students in face-to-face programs. However, as argued by Chaquime (2019), the structure and funding model adopted by the UAB System

imposed limitations on such integration. In the same section, the 2013-2017 IDP also emphasizes guidelines aimed at preparing both the internal and external communities to engage in DE, as well as encouraging and supporting the development of educational materials in different media and technologies (UFSCar, 2013b).

The 2013-2017 IDP further highlights the high degree of compatibility between UFSCar and national initiatives such as the Support Program for Federal Universities' Restructuring and Expansion Plans (REUNI) and the UAB System. According to Selznick (1971, p. 61), "internal concerns and institutional commitments also include externally decided objectives that must be accepted to avoid serious limitations". In this regard, it is worth recalling a statement from Participant B:

We are left with the false sensation that we are making changes, while in fact we are serving the needs of raising funds... We fought tooth and nail for that... to expand access to higher education... and distance education... is an expansion of access to higher education (Participant B).

The statement illustrates how the university adjusts its planning to remain relevant and legitimize itself within its field, avoiding limitations, and reinforcing the idea that, with the Higher Education Reform of the 1990s, the university had to integrate into the capitalist logic and compete for resources to sustain its activities.

Like the previous plan, the 2012-2016 Management Plan was based on the guidelines of the 2013-2017 IDP and the proposals set forth in the Management Program of the elected rectorate team. Structured into axes—further divided into sub-axes, operations, and actions aimed at addressing the challenges of each sector of university management—the document mentions the distance learning modality in two operations designed to tackle the challenges of Axis 1 (Training in Different Modalities), as demonstrated in Table 2.

Table 2

Operations foreseen in the Strategic Plan for Management 2012-2016 for the implementation of Axis 1

Operation Name	Responsible	Contributors
Axis 1 - Training in different modalities		
01.01.00 - Undergraduate curricula flexibilization	ProGrad	-
01.02.00 - Continuity of the institutionalization process of UAB courses	SDE	ProGrad
01.03.00 - Support for teaching activities in the three periods	ProGrad	ProACE
01.04.00 - Valuing extension and research activities from an undergraduate perspective	ProGrad	ProEx

01.05.00 - Reflection on the role of the University today	Rectorate	AsR
01.06.00 - Hybrid education	SDE	ProGrad
01.07.00 - Implementation of the Secretariat for Affirmative Action	ProGrad	SPDI, Implementation Commission, ProGPe
01.08.00 - Improving the training of postgraduate students for teaching	ProPG	ProGrad

Source: UFSCar, 2015, p. 6.

SDE, the department responsible for distance education initiatives, was tasked with managing three challenges to meet the operations described in Table 2: *Challenge 1* involved continuing the institutionalization process of UAB courses, which began in November 2012, with a completion deadline set for November 2016; *Challenge 2* focused on developing hybrid education, also initiated in November 2012, with the same projected completion date; *Challenge 3* aimed to restructure the organization and operation of SDE.

The 2015 Institutional Self-Assessment Report presented several indicators for the first challenge. These included the drafting of a Cooperation Agreement to offer extension, improvement, and specialization courses via distance learning, student insurance coverage, and integration between the university and in-person support centers.

For the second challenge, the reported indicators included the operation of Moodle version 2.4, the hosting and management of 869 virtual environments, and the implementation of the Automated Course Creation System (SiscAD) as referenced in UFSCar, (2016, p. 120).

However, regarding the third challenge, although SDE's restructuring was carried out in practice, it had not yet been formally standardized at the time of the investigation.

The following subsections continue analyzing the relationship between UFSCar and its organizational field, with a specific focus on the UAB System. It is considered that the systematic incorporation of the distance learning modality at UFSCar began through the partnership established with UAB.

Initial Actions and Structural Adaptations: About the UAB-UFSCar Partnership

The incorporation of DE at UFSCar required initial actions and significant structural adaptations to integrate the modality into the university environment. The process, driven by adherence to the UAB System, involved the creation of specific administrative units, the development of institutional policies, and the restructuring

of academic and administrative processes. UFSCar's adherence to UAB took place in 2005 when the UAB1 call for applications was launched.

At the time, the university administration invited all departments of the institution to discuss the matter and form groups interested in offering courses. Additionally, a committee of specialists was created to coordinate the conditions for UFSCar's participation in the UAB System (UFSCar, 2009a). According to Participant J, this institution-wide invitation was a distinguishing feature of UFSCar's approach, allowing for a richer and more cohesive pedagogical proposal. This differed from the processes adopted by many other institutions that joined UAB.

Based on Selznick's institutional perspective (1971), this consultation process reflects UFSCar's commitment to democratic governance and to providing high-quality, public, and free education. Furthermore, adherence to UAB demonstrates the pursuit of legitimacy in the field of higher education after the changes introduced by the reform of the 1990s, as evidenced in the 2013 Activity Report:

The inclusion of UFSCar in the UAB System, approved by the University Council through Resolution No. 520 on July 7, 2006, was in line with its Institutional Development Plan (IDP), its historical commitment to offering public, free, and high-quality education, and its effort to ensure access and retention conditions at the university for students from diverse backgrounds and social strata... UFSCar seeks to respond, on one hand, to the demands for training competent professionals and, on the other, to address the needs of a social reality marked by exclusion (UFSCar, 2014b, p. 58).

The excerpt reinforces the idea that DE played a key role in the reform of higher education in the 1990s, by expanding access, decentralizing course offerings, and contributing to the training of qualified professionals. Another enlightening excerpt:

The initial proposal to create the distance learning Bachelor's Degree in Information Systems course had three main motivations: (i) Collaboration with the government initiative to expand higher education with the UAB; (ii) Training of human resources in a technical area with high demand and growth; and (iii) Ease in articulating the necessary skills with the departments involved. (UFSCar, 2010b, p. 8)

Of the five programs offered by UAB-UFSCar, only the two undergraduate programs (initially, only Pedagogy) aligned with the priorities of *Decree No. 5.800* (2006). Although there were no restrictions on offering programs in other areas, negotiations between UFSCar and the MEC were necessary to establish the partnership, as Participant F explains:

So, we believe that they [MEC] did not want to interfere in the university's autonomy, but they wanted to see how it would organize itself to do this... The modality was not well accepted in the public sphere, so they let the universities do what they proposed. (Participant F)

The research also revealed that the partnership with the UAB System resulted in the allocation of faculty and technical-administrative positions at UFSCar. Participant K recalls the promise that joining the UAB System would enable the hiring of additional professors. According to the 2008 Activity Report (UFSCar, 2009b), the institution had already received approximately 16 faculty positions and eight technical positions, which were later allocated to SDE. In a subsequent phase, additional faculty positions were received and distributed to departments involved with UAB-UFSCar undergraduate programs.

It can be concluded that while this partnership was established to support DE, it also functioned as a strategy to secure faculty positions to expand existing courses. In this regard, Lima (2014, p. 24) explains that through the creation of the UAB System, "faculty positions were authorized for federal higher education institutions for distance education (Ordinance No. 854/2006)."

UFSCar's participation in the UAB System and the creation of distance undergraduate courses were approved by ConsUni Resolution No. 520 on July 7, 2006. The resolution clearly states that the courses were created as a counterpart to the resources provided by the federal government. Additionally, the Activity Report (UFSCar, 2014b) emphasizes the pursuit of legitimacy by linking the DE programs with Decrees No. 5.622 (2005) and No. 5.800 (2006).

The next subsection discusses the initial actions resulting from the beginning of the institutionalization of distance education at UFSCar.

Initial Actions for the Institutionalization of Distance Education at UFSCar

After establishing a partnership with the UAB System, UFSCar created an Implementation Commission to establish the university's distance education center, which would later become the SDE. The commission initially included representatives from the university administration and the SIN, which managed all technological infrastructure at UFSCar. Prior to the UAB-UFSCar partnership, SIN was also responsible for integrating technologies into the educational process. While the commission was presided over by the university administration, SIN played a fundamental role—executive, practical, and mediating—in coordinating actions and resolving conflicts until SDE was officially created. SIN also led efforts such as coordinating course proposals for the Ministry of Education, training professors in

the use of the virtual learning environment (Moodle), and creating environments for DE courses (UFSCar, 2007).

The commission's first initiative was to hold a public selection process to hire faculty with experience in managing distance education, who would join the already established professors on the commission (Participant C; Participant J). Initially, only one faculty member was appointed, followed by two more. As a strategic action, this Implementation Commission played a key role in successfully launching DE at UFSCar and in supporting initiatives promoted by newly hired professors specializing in DE, who, at the time, had limited institutional influence. Participant J argues that the Implementation Commission was essential to ensuring quality of DE at UFSCar, acting as a shield between faculty and other involved sectors.

According to the Institutional Self-Assessment Report (UFSCar, 2009a), the group was composed of a professor specializing in DE management, two professors with expertise in instructional materials and educational technologies, and a senior faculty member experienced in tutoring and feedback processes.

Initially, these professors were not affiliated with specific departments but were instead allocated to the Office of Undergraduate Studies (ProGrad) and later to SDE (UFSCar, 2007). The team worked within ProGrad in partnership with SIN, offering both pedagogical and technical support to implement the five courses approved under UAB, following institutional procedures to ensure quality (UFSCar, 2007). As noted by Selznick (1971), this group exercised leadership by guiding a process that might otherwise have been more arbitrary or subject to historical circumstances.

The decision to place the team within ProGrad allowed for the creation of a multidisciplinary unit exclusively dedicated to DE. Participant F highlighted that this arrangement gave the team greater flexibility during implementation. Had this faculty members been assigned to academic departments, their time would have been divided among teaching, research, and extension activities—many of which were unrelated to DE. Later, the four positions were transferred to departments, as SDE, being an academic support unit, could not permanently host these faculty members.

From the perspective of Institutional Theory, the Implementation Commission—particularly after the introduction of faculty members—played the role of a *champion* (Tolbert & Zucker, 1999) in the institutionalization of distance education. The group contributed legitimacy to the organizational arrangement and helped develop pedagogical projects for the courses.

Among the first priorities was the establishment of internal protocols and procedures for offering courses. There was also a need to organize entrance exams for student selection, with the first selection process distributing vacancies

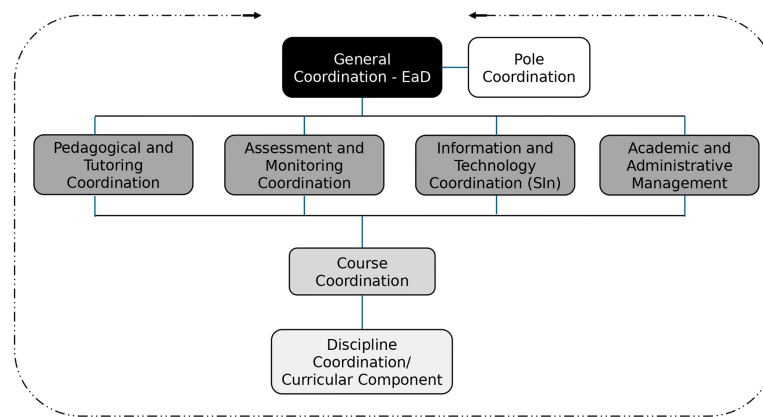
between admissions in the second semester of 2007 and the first semester of 2008 (Participant J). From the beginning of activities, administrators also focused on training faculty and other professionals involved, including tutors, campus coordinators, and instructional designers. The training was provided continuously and, in the case of tutors, was open to the general public (Participant J).

However, even during the *habituation* phase (Tolbert & Zucker, 1999), some faculty members resisted teaching in DE programs. Participant F stated: “There was a very difficult process of raising awareness and convincing the first group of faculty members to work on the introductory courses. We invested heavily in faculty training, but we still faced resistance.”

Between 2006 and 2008, a new organizational arrangement was created, although it was not yet part of the University’s official structure. Figure 1 shows how the management of distance education at UFSCar was initially structured.

Figure 1.

Basic organizational structure of the UAB-UFSCar management system.



Source: Adapted from UFSCAR, 2009a, p. 226.

The General Coordination was responsible for the political-pedagogical and administrative-financial management of UAB-UFSCar initiatives. Other coordination areas included Pedagogy and Tutoring, Evaluation and Monitoring, Information and Technology, Academic and Administrative, Course, Discipline, and Campus Coordination (UFSCar, 2009a). The implementation of this arrangement was facilitated by the inclusion of technical-administrative staff, recruited through the partnership with UAB. These personnel contributed to expanding the new structure and eventually establishing SDE (Participant H).

In 2008, SDE was formally established by ConsUni Resolution No. 617, along with the creation of the Distance Education Council. The council was responsible for defining and overseeing UFSCar’s distance education policy, while SDE was

tasked with executing this policy, supporting the implementation of initiatives, and ensuring the quality of instructional materials (UFSCar, 2008).

It is important to note that, initially, SDE's activities were closely tied to the delivery of UAB-supported courses. However, over time, the department developed a distinct identity, supporting both UAB-related initiatives and other distance education programs at the university (Participant H).

In 2008, UFSCar obtained its experimental accreditation to offer distance education courses, which was confirmed in 2010 with full accreditation. The regulation of these courses followed the same procedures as those applied to on-campus programs, linking SDE to both the Distance Education Council and the ProGrad (UFSCar, 2011). According to Chaquime (2019), the UAB System represents the educational policy that has most significantly promoted the expansion of DE in public higher education institutions, initiating the institutionalization of this modality at UFSCar.

In summary, driven by its adherence to UAB, UFSCar continued to integrate distance education into its organizational structure, especially concerning the incorporation of this modality into institutional policies and regulations. However, regarding organizational culture, distance education has not yet reached full consolidation. The accumulated experience within the university was insufficient to establish DE as a viable alternative for maintaining educational activities during the pandemic. Furthermore, in the current Institutional Development Plan (IDP), effective until 2028, distance education remains restricted to postgraduate and professional development courses, as will be discussed in the next section.

The Institutionalization of Distance Education at UFSCar: Reflections of the Pandemic and Perspectives

The pandemic that impacted human history between late 2019 and May 2023 imposed conditions of social isolation and, in the field of education, forcibly introduced students and teachers at all educational levels into teaching and learning processes mediated by technologies—whether digital or not. As a result, remote education (Araújo *et al.*, 2024) became widespread as a means of maintaining formal education in schools and universities worldwide throughout the public health crisis.

Documentary research on the university's actions during this period revealed the publication of several guiding documents in 2020, demonstrating the UFSCar's interaction with the educational field as it was configured at the time. These documents are organized in Table 3.

Table 3

Documents³ published by UFSCar at the beginning of the pandemic

Document	Description
Ordinance GR No. 4.370, of March 14	Established the suspension of classes and curricular activities starting March 16, 2020.
Ordinance GR No. 4.371, of March 15	It provided guidance on the replanning of administrative activities, as well as work procedures.
Ordinance GR No. 4.380, of March 20	Extended, for an indefinite period, the suspension of classes and curricular and administrative activities.
Resolution No. 319, of March 27	It immediately suspended the academic and administrative calendars of UFSCar's in-person undergraduate courses and made it clear, in the sole paragraph of Article 1, that no activity carried out in person or remotely during the suspension period would be counted for the purposes of replacing classes/content.

Source: authors.

Among the documents in Table 3, it is noteworthy that in the third paragraph of Article 2 of Ordinance No. 4.380/2020, it establishes that specialization and professional development course activities could “be conducted in the distance learning modality, following the established institutional guidelines and in agreement between the course coordinator and participating students” (UFSCar, 2020a).

In the same document, Article 4 stipulates the “planning for the possible use of methods and tools for teaching and research activities in remote modality, with actions to be formalized through specific regulations” (UFSCar, 2020a).

This makes it clear that, although the university had prior experience with distance education, its institutionalization had not yet been fully integrated into UFSCar's culture, as it was not recommended for undergraduate programs and remained restricted to postgraduate and professional development courses.

On July 27, 2020, through COG Resolution No. 330, UFSCar approved the provision of emergency non-in-person academic activities for its undergraduate courses during the pandemic. It is important to highlight that Article 2 of this document specifies that activities conducted through virtual means do not constitute distance education,

but to an emergency teaching format carried out remotely in which not all the necessary requirements for distance learning are met, although it is guided by

³ The documents are available for consultation at: <https://www.ufscar.br/covid19>. Access: December 5, 2024.

many elements of this modality, as it is based on the application of digital information and communication technologies (TDIC) to develop teaching and learning actions (UFSCar, 2020b).

The teaching and learning activities developed in UFSCar's undergraduate programs during the pandemic were conventionally referred to as Emergency Remote Teaching (ERT). The regulation for offering curricular activities through digital means to facilitate ERT was established by Resolution No. 331/2020 of the Undergraduate Studies Council.

Regarding the institutionalization of DE at UFSCar, an analysis of documents published during the pandemic indicates an effort to differentiate digital activities—including the use of virtual learning environments and synchronous and asynchronous interactions—from the distance education modality. This suggests that institutionalization had not yet overcome internal resistance and was not fully integrated into the university's culture, remaining at an *objectification* stage.

Concerning the pandemic period and its impact on DE institutionalization, it is worth mentioning the 2018-2022 Institutional Development Plan (IDP), which was developed to consolidate institutional objectives and goals for the outlined period, although its publication only took place in 2021. The document explicitly states that its implementation fulfills a legal requirement, but it also emphasizes that the university views it as a guiding framework for management, especially "when the institution must reinvent itself in times of such profound sanitary and economic crisis" (UFSCar, 2021, p. 13). This clearly refers to the public health crisis and the resulting changes in the educational field, which indeed influenced the university's organization, as previously discussed.

Similar to the 2013-2017 IDP, the 2018-2022 IDP incorporates the Institutional Pedagogical Project (IPP) in its text. In the section where it is presented, the IPP mentions the distance education modality alongside in-person education in four key guidelines: (i) promoting and valuing interdisciplinary work based on the teaching-research-extension triad, (ii) valuing diverse teaching methodologies, (iii) encouraging the development of new educational technologies, and (iv) implementing, monitoring, evaluating, and sustaining actions aimed at excellence in teaching-learning processes. These references can be understood as an indication that the modality is embedded within the organizational structure.

It is worth noting, however, in relation to the 2018-2022 IDP, the outline of institutional guidelines aimed at distance learning in the section that deals with UFSCar's teaching policies for the period. In this regard, it is important to say that the document initially emphasizes the MEC regulations that make the distance

learning course offerings up to 40% more flexible in on-site courses,⁴ but makes it clear that courses in this modality will only be implemented at postgraduate level. Further on in the text, however, the document makes it clear that “on-site courses may introduce, as long as it does not exceed 20% (twenty percent) of their total workload, the offering of curricular activities in the distance learning modality” (UFSCar, 2021). At the end of this section, the document clarifies that distance learning courses are subject to the general rules of undergraduate studies.

It is also important to emphasize that, although DE is institutionalized in UFSCar’s official documents, in terms of culture, the university still appears to view undergraduate distance programs as dependent on external funding, rather than as initiatives to be developed autonomously. This reliance on federal funding is reinforced later in the document, which references the establishment of agreements for offering undergraduate courses and creating in-person support centers.

Also notable in the 2018-2022 Institutional Development Plan (IDP) is the emphasis placed on the partnership with the UAB system as a milestone for the university’s growth. The document highlights this partnership’s role in expanding the university’s presence, deepening its engagement and dialogue with the surrounding communities, and enabling it to meet social demands in the regions where it operates (UFSCar, 2021).

The most recent 2024-2028 PDI references the public health crisis and the university’s engagement with its educational environment. It states that “the institution must reinvent itself in times of socioeconomic, cultural, and environmental transformations that impact university management” (UFSCar, 2024, p. 18).

Regarding the institutionalization of distance education, an interesting point in the document appears in the section addressing educational policies, where it is mentioned that teaching activities, whether in-person or distance-based, can be mediated by technology to promote learning flexibly. It states that “activities may blend physical and virtual spaces, utilizing technologies and methodologies appropriate to each context and purpose, aiming at a flexible education that meets various educational objectives” (UFSCar, 2024, p. 93-94).

Thus, it is evident that UFSCar’s perspective on teaching and learning processes seeks to break down barriers between in-person and distance education, enhancing educational processes through the integration of technologies. When relating this observation to Institutional Theory, it can be said that if the university successfully implements flexible education, the

⁴ MEC Ordinance No. 2,117, of December 6, 2019, which provides for the offering of workload in the distance learning modality in face-to-face undergraduate courses at federal Higher Education Institutions.

institutionalization of distance education will be fully embedded in the organizational culture, overcoming all resistance and prejudices, and fostering the emergence of an educational model that genuinely serves individuals' learning needs.

Final Considerations: On the Institutionalization of Distance Education at UFSCar

The discussions in this article aimed to analyze the interrelations between UFSCar and the higher education field in the institutionalization of distance education. This has been a complex process, shaped by internal and external pressures that required innovative strategies and organizational restructuring.

First, the analysis focused on institutional documents such as the Institutional Development Plan (IDP) and the Management Plan, based on the assumption that these documents serve as tools for assessing the efficiency of universities in meeting their goals while also reflecting institutional values through which universities legitimize themselves in society.

The analysis of IDPs and Management Plans revealed that the integration of distance education at UFSCar was progressively incorporated into the university's strategic vision. This aligns with scholars in the field, such as Ferreira and Mill (2014) and Mill and Veloso (2021). The study also showed that UFSCar had envisioned the systemic incorporation of distance education even before partnering with the Ministry of Education to offer courses through the UAB System. The university recognized its social role in democratizing access to higher education and had planned an institutional policy for distance education across all educational levels, as well as in research and extension areas, aiming for the same quality standards as in-person courses.

Next, the study examined the initial steps taken to integrate distance education into UFSCar's organizational structure. The university strategically formed a group of specialists in distance education system management, tasked with leading the institutionalization of the modality and providing cognitive legitimacy through their expertise and experience. Additionally, the organizational arrangement for managing distance education courses at UFSCar was based on UAB guidelines, reinforcing its role in advancing the institutionalization of distance education in public higher education institutions.

Finally, documents from the early pandemic period and the IDPs for 2018-2022 and 2024-2028 were analyzed to understand the effects of the health crisis on distance education institutionalization and the university's projections for the modality in the coming years. The findings indicate that, despite UFSCar's

accumulated experience in offering distance learning courses, during the pandemic, the modality was only sustained for postgraduate and professional development programs, while undergraduate courses resumed through the Emergency Remote Teaching (ERT) initiative. Regarding institutionalization, these decisions suggest that, at that time, distance education still faced resistance to fully integrating into the university's organizational culture.

As for future perspectives, the analysis of the 2024-2028 IDP points to a movement toward breaking down barriers between in-person and distance education to promote open, flexible teaching-learning processes that accommodate diverse educational needs.

The study highlighted progress in the institutionalization of distance education at UFSCar, particularly in adapting the organizational structure, standardizing course quality, and equating in-person and distance learning modalities. It also emphasized faculty and tutor training and support, as well as the integration of distance education into research and extension activities, further legitimizing the modality. Additionally, expanding course offerings to regions with little or no prior access to higher education has contributed to democratizing education.

However, persistent challenges were identified, including financial dependence on government funding programs, which complicates strategic planning and exacerbates the lack of sustainability in course offerings. Additionally, the continuous need for pedagogical innovation was highlighted, including the development of practices more aligned with digital culture, such as active methodologies and pedagogical flexibility. Another significant challenge is overcoming resistance to distance education, particularly among some faculty members who question the quality of instruction compared to in-person courses. Challenges related to ongoing investment in educational technologies and digital infrastructure were also observed, as they are crucial for meeting student needs and fostering meaningful learning experiences.

As final reflections and recommendations for future research and policies, efforts should focus on a deeper understanding of: quality assessment in distance education, equivalence between learning modalities, suitability of multi-instructor models, concerns about the precarious nature of remote faculty work, consideration of faculty workload, evaluation of the effectiveness of in-person support centers, alignment of institutional management systems with the specific needs of distance education, improvement of virtual learning environments, and promotion of inclusion and diversity, ensuring accessibility for students with disabilities, ethnic diversity, and remote regions. Regarding public policies for distance education, the need for sustainable funding and alignment with national guidelines is particularly emphasized.

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