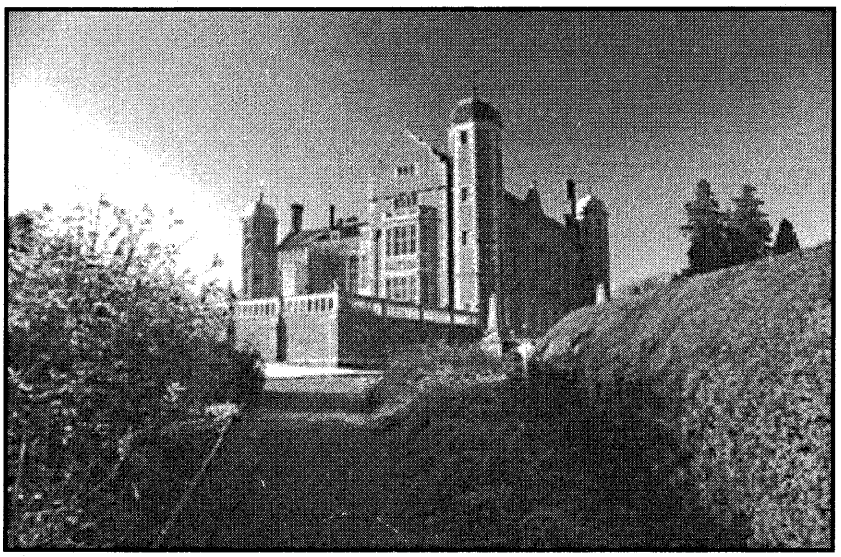
The 10th Cambridge International Conference on Open and Distance Learning

In association with The Commonwealth of Learning

The Future of Open and Distance Learning

Madingley Hall, Cambridge



Collected Conference Papers
September 2003

Edited by Anne Gaskell and Alan Tait

The Open University
Cambridge

The 10th Cambridge International Conference on Open and Distance Learning

The Future of Open and Distance Learning

Collected Conference Papers

September 2003

Edited by Anne Gaskell and Alan Tait

2003 Edited by Anne Gaskell and Alan Tait

The Open University in the East of England
Cintra House
12 Hills Road
Cambridge
CB2 1PF

ISBN 0 7492 6676 7

Cambridge Conference on Open and Distance Learning

The Future of Open and Distance Learning

Contents

The Future of Open and Distance Learning

Anne Gaskell and Alan Tait
The Open University, UK

'I have seen the future; and it works.'
Lincoln Steffers on the Soviet Union, 1919

'I never think of the future. It comes soon enough'.
Albert Einstein 1930

It is as ever a privilege to be able to contribute an introduction to this volume of distinguished papers written for the tenth Cambridge International Conference on Open and distance learning. The first was held in 1983 on the subject of Counselling in Distance Education, and the conference has had a commitment to the support of learners explicitly in its title – as in 2001 - or implicitly through the interests of the group of people who have often come to it over the years. Other conference titles have reflected a broad range of issues, and new priorities as they emerged: interaction and independence; quality assurance; the convergence of conventional and distance education; and learning and teaching with new technologies. So a tenth anniversary is something to celebrate, and a moment to reflect on where we are, and as the title of this conference proposes, where we are going.

However, looking into the future is a risky business, and no serious historian would ever allow her or his work to be used in this way. As well as the personal existential courage reflected in Einstein's refusal to engage with the future, we have evidence of the risks in being bold when assessing the future in the words of the American journalist Lincoln Steffers when visiting the Soviet Union in its very early days. The final literary reference introduced here that might suggest caution is the vision of the ancient prophet Cassandra fleeing from the Oracle after she had been given a glimpse of the future. However, while it has often been futile, preparing for the future has been a human instinct at least since the storage of food at the beginning of agriculture. It seems wise to do so. So we will add our voices to those in this volume of papers, drawing on them for clues as to what the major trends are that might provide what we are cautious enough to accept are no more than straws in the wind.

Let us begin with a simple distinction: pull and push factors. What will be demanded of the range of methodologies that come within the term open and distance learning (the push factor) by those who are or might be users, learners, students, sponsors, or in any way whatever direct clients (the pull factor)?

We have clear evidence that there is increased demand for learning, delivered in ways that are flexible and at a scale that significantly enlarges opportunity. That evidence comes from very different places, and so is all the more persuasive. For example, in a country with perhaps the highest participation rate in post-secondary education, the USA, we have the growth of a new institution like the University of Phoenix (see the paper by Brent Muirhead and Charles Juwah), which has clearly established that it offers something that people want: over the period 1978 to 2002 it has grown to serve nearly 165,000 students. It is fair to say that it does this with an organisational character and in ways that are controversial in its own country (the authors discuss this), and would seem strange as things stand at present in some other places. The University did not come from government, state or religious institutions but from private

and entrepreneurial activity. The paper's authors believe this university could make a significant contribution to the expansion of opportunity in the UK. The pull factor in the USA would suggest that what is offered is wanted, and there is no doubt that entrepreneurial initiatives in the world of education and training will continue to increase. International trade agreements such as GATT are under significant pressure to agree that education is a business that should not be protected within national borders any more than say agricultural produce (though these latter are in fact well protected by both the EU and the USA). Ian Walcott from Barbados takes up the issue of commoditisation within the broad framework of globalisation, and proposes that e-learning is accelerating that process. Whether Cassandra-like the reader recoils from such a vision, or in the manner of Steffers welcomes it as the solution to meeting need, what is sure is that big business can be created in the educational context, and educators are less likely to find Einstein's relaxed attitude satisfactory, either from the perspective of professional responsibility or survival.

We have an example in the Nigerian Open University, and in the account of its work from Mercy Ogunsula-Bandele, of more evidence of pull and push. The NOUN is a new example of the 'classic' open university established in a developing country where participation rates in post secondary education would seem low, and indeed where secondary participation is by no means universal (statistics are not available, but the adult illiteracy rate is recorded as 30% for men and 48% for women: World Bank 2001: 277). What is clear is that educational opportunity is wanted by a range of Nigerians, and that a large scale flexible institution such as NOUN has been adopted as a key element in expanding provision. Work in Ghana at the University of Education, Winneba, described for us by Theophilus Aquinas Ossei-Anto, provides further evidence of governmental initiatives to meet very significant need in the supply of teachers: a global issue that is particularly acute in the African continent. Notable is the engagement with technologies to support learning in an environment that makes this very problematic, while undoubtedly necessary.

From Western Canada we have an example of a different issue: the need for continuing professional development of psychiatric nurses. This apparently underserved group is, in the paper from Gail Crawford, being met for the first time in a significant way through new programmes of study using ODL methods. Continuing professional development for teachers in Puerto Rico in order to change the ways schoolchildren learn and teachers teach is accounted for by Juan Melendez from the Puerto Rico Virtual School Project.

The first tentative conclusion would be from this group of papers that demand for education amongst adults – for the use of ODL has been and continues to be most substantially though not exclusively for adults who have had a break between schooling and post-secondary study – is strong in countries with high participation rates as well as in those who have a longer way to travel. It is of interest here however to introduce the paper from Elizabeth Manning, who analyses the ways in which new younger audiences for the OU UK are being recruited and supported. Audience too is changing in its nature, in terms of educational background, linguistic variety, age cohorts, and in many countries gender. The organisational models are in a process of change too: with governments making major developmental initiatives but new forms of private educational enterprise entering the field and finding audiences. Technology and globalisation are assisting both kinds of initiative.

There are papers which reveal something of the difficulty of the problems of change as things stand at present. Jennifer O'Rourke in her account of the ways in which Procrustes fitted his guests to his bed – with a great degree of discomfort it can at least be said – offers us an

account of the ways in which an institution changes its audience and thus its mission when it adopts new technologies. She identifies the range of cultures and ideologies that exist within the 'big tent' that is ODL, and which indeed is borne out in this collection of papers. From Marquis Bureau, Joan Collinge and Yvonne Tabin, also in Western Canada, comes a consideration of themes that are closely related. They analyse the change process taking place at an innovative university such as Simon Fraser as well as a professional association such as the Canadian Association for Distance Education (CADE). They refer too to the challenges in managing change and balancing the commitment to values and practices developed in the past with changes demanded by technology. It is surely the case that the conscientious educator needs to reflect critically at all times but it seems at no time more acutely than now on the core ideas that underlie, support or indeed oppose her or his work. The nature of things is often covered up, and it is the duty of educators to fight the obfuscation of understanding of contemporary life. This too is an issue that will engage us – the professional community of educators – for the future.

Let us turn now in more detail to the ways in which institutions attempt to support the learners who come for study using ODL (the push factor): what does the supply side do for those who make a demand? And let us begin with the core question that Ormond Simpson has, to his great credit, insisted on asking relentlessly for many years: 'Will we go on failing our students?' Retention, as Simpson points out, has been the Achilles heel for ODL throughout its entire history. On-line learning provides little comfort in this regard, indeed following O'Rourke's observations, it does not seem to serve the needs of the learner in terms of success in some worrying cases. In Simpson's view, and he is persuasive, institutions that do not adjust their practices to put learner success at the core of their teaching mission will survive with difficulty. This perspective is taken up in detail by Graham Gibbs who reports on a symposium on retention, identifying it as a key issue for institutions. Insights given by participants from both ODL and conventional adult and HE show some striking similarities, both in the importance of the quality of course experience for students and in the steps institutions can take to support students and improve retention. Most theoretical models on student retention concern conventional higher education and have not fitted the experience of ODL students. Several alternative models are discussed, among them theoretical frameworks derived from marketing. Both Simpson and Gibbs identify a change in the demands that students themselves are making of institutions.

Here we have another important clue about the future which is discussed in greater detail by Troy Cooper and Sue Hemmings. Students, through the commodification of education, are constructing themselves as customers and making demands in ways that were not done before in educational contexts, with consequent repositioning of tutors as part of an 'after sales service team'. Cooper and Hemmings consider the implications of this in relation to the teaching and learning relationship and student retention.

The need to cater for students' needs is addressed by Hisham Dzakiria and Rob Walker, in their analysis of cultural differences between Malaysian and Chinese students in Malaysia. Such close attention to the actual worlds of learners is surely essential in its attention to the range of cultures in any one country: a trend that is surely going to increase in the future. Alison West of the National Extension College writes of the benefits that links between community development and community education can bring for highly disadvantaged groups like carers if they are provided with appropriate localised support. She argues that we need a shift from a provider-led to a learner-led provision with a consequent shift in

educational budgets: pull and push factors need realigning with greater power in the hands of communities.

From South Africa Anniekie Nndowiseni Ravhudzulo sets out the ways in which tutors are changing their practice in her institution UNISA, the longest existing single mode distance teaching university in the world. Patrick Kelly reports on work that aims to provide a vehicle for learners to reflect on their learning and plan for personal development. The Personal Development Portfolio, introduced at the behest of external regulation, is being tailored to meet needs that the OU UK recognises are lacking in its recognition of the lives of students careers over time rather than by course. While it is envisaged that the PDP will be supported by tutor comment, it is primarily a learner directed and learner managed vehicle. This recognition of the ways in which reflection on learning will be managed by learners themselves is surely another indicator for the future in the shift from teaching to the support of learning. The nature of learner personal development is well brought out in the account from Empire State College in New York State by Alan Mandell and Lee Herman. The words of their adult students shine out in a way that has the quality of drama, and the mentoring system provides a remarkably student–centred set of methodologies that have pre-figured and set the path for the more learner-centred approaches to curriculum that the combination of the resources on the web supported by computer conferencing have more recently promoted.

That world of on-line learning is reported on by Daithí Ó Murchú and Elsebeth Sorenson, from Ireland and Denmark respectively. They demonstrate how collaborative learning practice creates a community of practice, and attempt to demonstrate the value of the learning process that is created. Janet Macdonald and Liz Bennett of the OU UK also report on work with tutors supporting professional development on-line, and they show how they are attempting to create communities of practice with tutors across a range of subjects and academic areas. Online support for tutors is also the subject of Kathleen Gilmartin's paper in which she discusses the way the OU UK is meeting the demand for web-based information and resources through the development of a TutorHome website. Tutors will be able to access all relevant resources to support their students and have the opportunity to share good practice with each other; in the future they will be able to customise their own home page to suit their own requirements.

Here we see very importantly that the nature of learning, and the role of the learner within it are changing, supported by the technologies that make this possible, and permitting a progressive approach to curriculum moving away from teacher centred curriculum and more toward equipping students (who include tutors when they are reflecting on their own practice) to construct their own understandings of knowledge. Such a change is supported by Som Naidu from Melbourne, Australia, who analyses specifically how innovative assessment in on-line courses can scaffold learning, and is especially useful in the world of work to which many students want to relate their study. The relationship of learning and the world outside the institution, often the world of work, seems to be one that will be influential over the next period. The crude and always unsatisfactory distinction between vocational and academic learning is further broken down, as many students approach their education in the most serious way ever through learning in the workplace.

From Russia Elena Brunova reflects on the changing tasks and division of labour brought about by the introduction of technologies in education: again a clear clue about the ways in which institutions are having to re-organise themselves as so many other sectors have done. A specific example comes also from Russia, in the analysis by Alexander Zakharov and Irina

Zakharova, of the impact on traditional library services in their role of supporting students through the introduction of ICT.

In summary then the papers contributed to this conference reveal a range of indicators about the future:

- demand continues to grow for educational opportunity that ODL with its flexibility and potential for scale will continue to serve;
- ways of meeting that demand are seeing new entrants to the field, with entrepreneurial organisations coming in to compete with public institutions;
- commoditisation and internationalisation of educational programmes will accelerate;
- the new technologies are primary drivers in the commoditisation and internationalisation processes, and in organisational change, and also permit a range of new learning approaches that can be learner centred, but also exclusive;
- work experience will become an increasingly important prism through which study is pursued by adult students;
- the variety of students will continue to diverge from earlier norms, with challenges for new kinds of participants and for the institutions and organisations that seek to teach and support them;
- student success and the issue of retention will become more important, driven both by funding agency concerns as well as by student demands for service to them as customers.

It is clear that challenges are many, but that education is gaining in its importance both as something that is demanded (the pull factor) and as something that governments and the private sector believe they should for a variety of reasons provide (the push). There will surely be no shortage of work for those working in the field of ODL!

In conclusion, it can be said about the Cambridge Conference on Open and distance learning that recognition of the world of the learner has lain at its core over the 20 years it has been meeting. At the heart of this conference has been the energy and integrity of its co-founder Roger Mills, and we dedicate this volume to him as a token of our esteem for his professional contribution as well as our appreciation of his support and friendship over the period.

Anne Gaskell
Alan Tait

Cambridge, England
August 2003

References

World Bank 2001 *World Development Report, 2000/2001, Attacking Poverty*, Washington D.C, International bank for Reconstruction and Development/World Bank

The impact of information technologies on the contents of teaching activity

Elena Brunova
Tyumen State University, Russian Federation

Introduction

One of the basic features of education in the post-industrial society is its computerisation. However, if students, as a rule, meet new information technologies (IT) with enthusiasm, teachers sometimes demonstrate a sort of resistance, obvious or latent to their use. Thus, conservatism of teachers towards IT can be classified as a barrier to the development of effective and accessible training. The target of this research is analysing the reasons for such resistance and developing steps for overcoming it.

Nowadays, various types of barriers to computer-assisted learning are discussed. They can be classified as situational, epistemological, philosophical, psychological, pedagogical, technological, social, cultural, etc. (Berge, 1998, Galusha, Hughes *et al*, 2002). In this article problems are considered concerning changes in the character of teaching activity, caused by IT introduction into the educational process.

This research is carried out within the project *Digital Library as the Basis of Corporate Educational Space of a University with a Complex Branch Infrastructure*, implemented in the Tyumen State University, Tyumen, the Russian Federation, with the World Bank participation.

2. Research

According to the widespread myth, teachers fear that in future they will become an unnecessary attribute of the educational process and will be replaced with computers. However, the reasons their resistance must be deeper; they are determined by essential changes in the contents of pedagogical activity in the new educational environment constructed on the basis of computer and telecommunication technologies.

The basic changes in the contents of pedagogical activity are the following:

- In conventional education the central figure is the teacher. While using new IT, it is the student who becomes the active participant in the educational process, who may choose the form and rate of training, style of behaviour in the advanced educational environment. Thus, supporting the student at his/her movement in the given direction and navigation in the ocean of educational information, as well as assistance in solving arising problems are among the primary goals of the teacher.
- In the conventional educational process the independent research component is represented rather poorly. Students are involved in solving some problems, but these occur basically within the tasks stated by the teacher. Modern IT assumes strengthening of the research component, and training assumes searching, collecting and analysing information from computer databases; the tasks of training come nearer to the tasks of the real world, and the contents of training assume performance of the educational information in various formats.

- Due to rapid development of the informational and technological basis of education, there is a significant complication of curricula development; the teacher is required to develop special skills and procedures.
- Modern IT allows curricula materials to become more transparent, the access to them becomes open both for students, and for other teachers and experts. This circumstance, on the one hand, makes copyright problems highly important, and on the other hand, facilitates the inspection of these materials.
- Modern communication technologies providing curricula delivery assume the interactive communication of the teacher and each individual student; while in conventional education the generalized feedback from the whole group prevails over interaction between the teacher and each student, and interaction between students in general is represented poorly or is absent.

It is easy to notice, that all these obstacles for the teacher practically result from indisputable advantages of new technologies, which teachers themselves do not deny. Keeping a high quality of education while increasing its availability makes new opportunities and training modes attractive not only for students, but also for their teachers.

So, the teacher's work in the new information educational environment requires not only pedagogical, but also technological skills and experience of using modern equipment. Thus, the basic function of the teacher is shifted to supporting the student in his/her individual educational activity and assisting in the solution of problems arising in this process.

IT introduction into the educational process, despite widespread fears, does not result in replacement of teachers with computers and does not reduce the amount of teaching work; sometimes it is even increased. The effective solution of new teacher's tasks is possible based on at the labour division principle. The conventional educational system is one of the few spheres of human activity where this principle is hardly incorporated. Consequently, education is often characterized by wasteful use of teaching work when the purposes and the contents of many subjects are sometimes duplicated. Without significant growth of the number of students with existing amounts of basic educational resources, the increase of the efficiency of the educational system due to economies of scale is impossible. Supplying the teacher of the conventional educational system with new equipment will not help to provide such scale effect. A new specialisation of teacher who works according to his/her place in the general labour division system is required for this task.

A possible model of teaching activity differentiation may look as follows:

- *Curriculum Designer* responsible for curriculum development;
- *Invigilator* responsible for organising and arranging the tests and examinations;
- *Facilitator* responsible for consulting students in finding and realising their own educational paths in the developed curriculum;
- *Tutor* responsible for interaction with students during training.

This model of teaching labour division may vary specific targets of an educational institution, number of students etc. In small colleges it is possible to combine the functions of the Curriculum Designer and the Invigilator, or the Facilitator and the Tutor. In large universities with a complex branch infrastructure, on the contrary, further division of labour is possible, e.g. the professor who selects, structures and organises the contents of the curriculum and the expert in computer and telecommunication technologies may develop the curriculum

together. Thus, the curricula and testing development may be concentrated in the parent university, while consulting and tutoring may be organised directly in the branches.

References

ADAMSON, Ch. (2001) CALL: Can a teacher do it alone? *Educational Technology & Society 4(3) 2001 ISSN 1436-4522*

BEAUDOIN, M. (1990). The instructor's changing role in distance education. *The American Journal of Distance Education*, 4(2), pp. 21-48.

BERGE, Z.L (1998) Barriers Online Teaching In Post-Secondary Institutions: Can Policy Changes Fix It? *Online Journal of Distance Learning Administration,* 1 (2)

BERGE, Z.L. & MUILENBURG L.Y. (2000). Barriers to distance education as perceived by managers and administrators: Results of a survey. In Melanie Clay (Ed.), *Distance Learning Administration Annual 2000.*

GALUSHA, J.M. (n.d.) Barriers to learning in distance education. [Online.] http://www.infrastruction.com/articles.htm

HANNA, D.E. (1998). *Higher education in an era of digital competition: emerging organisational models.* Journal of Asynchronous Learning Networks. 2(1). [Online.] http://www.aln.org/alnweb/journal/vol2_issue1/hanna.htm

HUGHES, S.C. et al. (2002) Overcoming Social and Psychological Barriers to Effective Online Collaboration *Educational Technology & Society 5 (1) 2002 ISSN 1436-4522*

RASHTY, D. (1995) Traditional Learning vs.. eLearning // http://www.addwise.com/articles

A multi-level analysis of the impact of technology on organisational structures

Marquis L. Bureau, Mbureau Consultants, Canada
Joan Collinge, Simon Fraser University, Canada
Yvonne Tabin, Simon Fraser University, Canada

Introduction

This paper brings together the perspectives of three individuals - each interested in the impact of technology on organisational structure - but within different domains. The multi-level analysis explores how technology has affected a centre for distance education operating within a dual-mode institution; the dual-mode institution itself (Simon Fraser University); and a professional association (CADE-ACED: the Canadian Association for Distance Education). While focal points may differ, there are features common to each discussion. Each is informed by the literature on change and on the integration of technology. And each concerns itself with what happens to people within those organisational structures as technology increasingly makes its presence known. The extent to which issues pertinent to each unit of analysis are intertwined is addressed in the closing commentary. As we go forward, the challenge is both to honour the values of distance education's past and to embrace the emerging values and opportunities that technology provides.

The Subject at the Centre: Process and Product in the CDE

The Centre for Distance Education operates as an administrative unit within a traditional campus. Ours is dual-mode institution. Faculty members are not required to develop distance education courses nor, when they do so voluntarily, are we in a position to insist that they develop them in a certain way or incorporate online technologies of any kind. They develop distance education courses above load, for which they receive a stipend, and then graduate student tutors are hired to facilitate the courses during the delivery phase.

When the Centre opened in 1975, without the educational technologies available to us then, all courses were print-based. Students were able to communicate with their tutor during two office hours per week. Course authors created a study guide for the course and developed sets of assignments and exams. They were encouraged to revise their courses every three to five years.

Courses were then - and continue to be - supervised by program directors, each of whom was responsible for a number of academic areas and worked with and supported course authors as an instructional designer during the course development process. The work of the course author and program director was originally supported by a production department where print materials were formatted for duplication. Later a graphic designer and editor were added to the production staff.

In the past our distance education courses were very firmly and similarly shaped by the technologies available at the time: print materials and telephone contact. Even though courses showed the mark of their course authors and program directors internally, they all "looked" the same. Differences were not apparent at casual glance. A unity of a kind - study guides

clearly identifiable by the professionally designed covers and coil binding - prevailed. And with that unity - a branding - came organisational strength in product.

Much has changed as educational technologies have been introduced to the Centre. From the beginning of the course development cycle the demands of online courses on production staff and program directors have been greater than those exerted by print-based courses. Planning and design of online courses is more complex and takes more time. More time is needed for course authors to learn about the technologies and, more importantly, new ways of teaching and developing course materials with the technologies. In addition, courses are no longer static, but are, rather, dynamic entities that can and need to be nurtured over their lives in very attentive ways. To support this work one and then a second "instructional support technician" joined the unit.

The greater range of online technologies available now has brought with it concomitant opportunities for significant variation in course design and style. The freedom and range of possibilities for online course design allows not only program directors and instructional support technicians to shape courses entirely as they feel appropriate, but also course authors whose activity would have been "shaped" more firmly in the past by the template of the print study guide.

As courses became increasingly complex and drew on the resources and skills of more people, we realised that in order to work more efficiently we needed to communicate and plan together. We now begin course development with a team meeting at which time we introduce the course author to the various players involved in the development process; discuss the course and pedagogical issues and challenges regarding online learning; examine copyright concerns; and outline the support available to the course author. While adjustment and refinement of this process continues as we explore the world of online delivery - and some tensions do exist - a general sense of course development as a mutual and shared process is forming. A community of design is emerging amongst participants around a changed and changing course product.

This latter issue, that of course design in an online world, is particularly perplexing. We carry on amongst a swirl of dialogue about student-centredness over teacher-centredness; about constructivism; about teachers and students as co-learners; and about paperless courses and text that is "skimmable" and "scannable." And we struggle to redefine the distance education course.

It is clear that in the online distance education world the study guide is no longer *the* course. Interestingly, however, the best of our traditional study guides can perhaps provide some guidance in this regard. The very best of our courses are rich - though not necessarily weighty - in text. These are courses that, through their text, convey a passion to the student about subject. The text is not only a rich resource for students. It is also an exciting journey for them into a subject, the invitation extended by an experienced, thoughtful instructor. They represent classrooms that are "neither teacher-centred nor student-centred but subject-centred," in which subject becomes "the centre of our attention" (Palmer, 1998, p. 116).

Some object to the idea of print materials for any course in an online world. The question is not so much whether or not there should be print, but, rather, what "text" becomes, where it situates itself as part of a course supported by online technologies. Text can step off to the

side (the course author as resource expert) yet remain central as the vital "subject" to which Palmer refers.

Does thinking about the subject as the centre of the course help us to determine exactly (or suggest automatically) what our online courses should look like? Whether we will seek richness in diversity, or a greater unity (or perhaps a few different unities) with regard to the online product of the Centre? Perhaps not, but the community of design that now supports and attends to the process of course development can serve as the locus for further exploration of these issues. The subject must be at the centre of our commitment to development in an online world and our development community the nucleus around which our dialogue occurs.

The Emerging Effects of Technology on a Dual-Mode Institution

The changes referred to in the previous section are taking place within the larger context of an institution trying to establish itself as a leader in the pedagogically-sound use of educational technologies. At one time the Centre for Distance Education was the only unit on campus that worked with faculty intensively to develop distance/online courses. Now there are three units engaged in similar work.

- The Centre for Distance Education (CDE), which services approximately 12,000 course registrants over three semesters. The work of the Centre is described above. The CDE receives financial support from central administration to work in partnership with academic units not only to develop but also to deliver distance/online courses. The CDE is one of several units within the Office of Continuing Studies. The director reports to the Dean of Continuing Studies, who in turn reports to the Vice-President, Academic.

- The Learning and Instructional Development Centre (LIDC), which is the University's faculty development unit. The former Director of the Centre deliberately chose not to highlight technology in the programs he offered. At that time he was concerned that an emphasis on IT could have a negative effect on his Centre's ability to attract faculty, some of whom were and some of whom continue to be antagonistic toward teaching with technology. This, he reasoned, would have a detrimental affect on the unit's mandate to improve teaching overall. This is not to say that IT issues were ignored. They were not. But they were introduced subtlety. The new director, hired two years ago, adopted a different approach. With a much larger budget than his predecessor enjoyed, he has placed greater emphasis on promoting teaching with technology through workshops and one-on-one consultations. Faculty who visit the LIDC for IT support are typically looking for ways to enhance the courses they teach on campus. While valuable support is provided to faculty members, there is not the same degree of intensive involvement in the course production process from inception through to completion as there is in a CDE project. The LIDC is funded in part through central administration and in part through revenues generated through programs and conferences. The Centre is an entity unto itself whose director reports to the Associate Vice-President responsible for learning technologies.

- eLINC (e-learning Innovation Centre), which is the online course development unit at a newly acquired SFU campus. This campus was formerly known as the Technical University of British Columbia. When a new government assumed power in 2000, TechBC was targeted for review as part of large-scale core services review throughout

the province of British Columbia. As a consequence, TechBC lost its independent status and in 2002 became a part of SFU. The Technical University, as its name suggests, relied heavily on online methodologies to deliver its courses. Many had the impression that courses were delivered entirely online. While some were, many required students to attend classes on campus. A mixed-mode or hybrid approach to teaching with technology more accurately describes the mode of delivery. Upon hire, former TechBC faculty agreed to teach online, to participate in a team approach to course development, to present their work at a meeting of their peers for constructive criticism, and to use the online learning platform developed in-house. The director of this Centre also reports to the Associate Vice-President responsible for learning technologies.

There are those who argue that the three units should fall within a common administrative structure. There is merit to this perspective. It would, for instance, enhance opportunities to share resources, to benefit from course development experiences, and to co-ordinate or equalize workloads. It is important, however, to ask: "What, if anything, would be lost?" Being rooted within the Office of Continuing Studies, the CDE is imbued with its values. While the Centre is committed to promoting and supporting SFU's interest in becoming known for the quality and quantity of its online programs, it is also dedicated to the outreach mission of Continuing Studies and the University. The two goals cannot always be simultaneously satisfied. Whereas eLINC will work only with faculty willing to develop online courses, the Centre for Distance Education believes that its primary mandate is to extend the scholarship of the academy into the community and to provide access to learning that would not otherwise be available to some students. Wherever possible this is done in ways that benefit from the potential that technology introduces. However, some faculty remain unconvinced of its merit. If a choice must be made between satisfying the need for outreach and satisfying those who argue that all courses must be technology-dependent, the decision is always in favour of outreach.

There are those who argue that the CDE is embedded in its history and cannot see the future. Or if it can see it, it is not responding to that vision. It's not that the CDE does not have a vision. It does. However, it also has a history - and values and an infrastructure that reflect its past. The values remain. They are to develop the best possible learning experiences for students, which draw on the most appropriate resources and technologies available. The service ethic to faculty members remains, which is to honour their academic expertise and their choice of teaching approach.

I have a saying on my wall at work. It reads: "Nice guys may appear to finish last, but usually they're running a different race." Are the units described above running a different race? While they are all travelling on a similar road, yes, they are in fact running in slightly different races. Furthermore, some started running many years ago; others, relatively recently. Some have charted the quickest way to get from one point to another; others, because of their history, must be sensitive to change and the challenges it presents to established processes and infrastructure and, most importantly, to people. To compare the advances of one unit against those of another without taking these factors into account can lead to faulty conclusions.

Bureau comments in the following section that the introduction of new learning technologies has resulted in increasing both the numbers of professionals and students in the field of distance education. It has also increased the number of players within many institutions.

Before universities undertake structural changes, they would be well advised to disentangle the following from the various units' shared interest in promoting the wise use of learning technologies: the audiences that each unit serves; the values that guide that service; and the infrastructure and administrative affiliations required to do it well.

Impact of New Learning Technologies on a National Association for Distance Education: A Case for Renewal

Just as public and private organisations are being transformed by both economic factors and the widespread adoption of new learning technologies, so, too, is the field of distance education. E-learning and distributed learning systems are also changing the nature of traditional distance education and creating new communities of interest with growing and divergent needs. For the last twenty years, the Canadian Association of Distance Education - Association canadienne de l'éducation à distance (CADE-ACED) has had the interests and professional development needs of the distance education community as its primary focus. It is interesting to observe that growth and transformation in e-learning has not translated into additional members for CADE-ACED. In order words, membership of the association has been stagnant for the last five years. The association's 20th anniversary provided a timely opportunity for its Board of Directors to establish a path for the future, to set priorities, and to evaluate the roles and support needs of professionals in blended educational models. To meet this challenge, CADE-ACED undertook a national consultation with its members and other leaders in the field including government and related national and international associations. This section details the aims and objectives of the national association, the key findings and outcomes of the association's recent consultation and general observations on the impact of new interactive learning technologies on the future of a national association.

CADE-ACED is a bilingual national association of professionals committed to excellence in the provision of distance education in Canada. It was founded in 1983 with six objectives: to advance and promote distance education nationally; to promote research into distance education theory and practice; to provide membership services including professional development; to provide a forum for interaction on a national, regional, provincial and local basis; to represent Canada internationally in distance education; and to promote access to learning at a distance. These objectives continue to guide the work of the association today. Traditionally, the majority of the association's membership came from university professors and practitioners studying distance education and/or offering programmes and courses at a distance. "The changing contexts of work, the dazzling array of new technologies and the changing purposes of learning needed to be included" (Garrick and Jakupec, 2000) in the aims and objectives of the association. Five years ago, the Board undertook an organisational review which resulted in keeping representation from all regions of the country and adding sector representation from primary and secondary education, colleges, universities, government and the private sector.

The data gathered in national consultations, focus groups, and subsequent one-on-one discussions revealed seven strategic directions reflecting the changing needs of the profession.

- Choosing a focus and a strategic direction - CADE-ACED is at a crossroads and must decide whether to remain an association of professionals interested in the field of distance education or to take on a larger leadership role and strive to become the association that guides the human resource and development needs of the profession as a whole.

- Organising the profession - With the growing numbers of people working in the field it has become essential to address the human capital issues affecting these new communities of practitioners.
- Research and Advocacy - In addition to maintaining its Journal, the association needs to consider what strategic actions it will take to support the broader research and advocacy requirements for the distance education sector as a whole.
- Market Positioning - With a clear vision and a clear sense of direction, it will be possible to increase the profile and market position by becoming "the voice for Distance Education in Canada".
- Opportunities and Trends - CADE-ACED could take a leadership role by aligning itself with the national agendas.
- Provincial and National Relationships - Given Canada's unique situation with respect to its thirteen educational jurisdictions, the association must continue to work in the political arena and to link with others in order to create national linkages.
- Strategic partnerships are a strategy for growth that needs to be considered with organisations in Canada and with other national and international organisations outside Canada.

The national consultations demonstrated that both economic and political changes are taking place in Canada. Public institutions are evolving from correspondence programming to the usage of technologies, the private sector is now involved with the intent of meeting the demand for professional training and continuing education, and governments are committed to market forces in education. "Demand for education for an increasing proportion of the population has resulted in the expansion of higher education and the demand for new approaches to it including a way of recruiting more students and of shifting the balance of expenditure on education away from the state and towards the learner" (Harry and Perraton, 2000).

The introduction of new learning technologies has resulted in increased numbers of professionals and students in the field of distance education. This increase is not reflected in the membership of Canada's national distance education association. CADE-ACED needs to confront its history if it is to emerge as a new setting reflecting the needs of today's professionals. According to Sarason (1989), there are three important aspects to the term "confronting history."

- The more individuals or small groups are aware of their relationship to the proposed setting, in terms of personal history, the less they are able to perceive that personal history as an incomplete explanation of the present.
- One is always dealing with a history of structured relationships meaning that the new setting reflects the history of relationships among diverse but related settings. Depending on whether the new setting continues to have a relationship with the old setting or not, the future can be history.
- The individual or small group assuming or given responsibility for the new setting utilizes this historical knowledge for actions that maximize the chances that the new setting will be viable and in ways consistent with its values and goals.

Concluding Comments

Bureau speaks of the importance of CADE confronting its history. Those words accurately describe the Centre for Distance Education's ongoing engagement in just that process - both

from the perspective of its internal practices and also its relationship to other units within the University. Managing the needed changes revealed when history is confronted, however, is challenging.

Each author has spoken of the importance of doing this and doing it well. Each is aware of the need for the desired changes to be "contagious " (Gladwell, 2000) - to be picked up and transmitted throughout the institution or association. Each domain must find its own "tipping point," the "moment of critical mass, the threshold, the boiling point" (Gladwell, 2000, p. 12) that sees new ideas take hold. Institutions and organisations truly committed to an espoused valuing of innovation need to recognise and act on the recognition that there cannot be "innovation without change" (Latchem & Hanna, 2001, p. 42) ... and therein lies the challenge.

References

GLADWELL, M. (2000) *The tipping point: How little things can make a big difference.* (New York, Little, Brown and Company).

JAKUPEC, V. & GARRICK, J. (2000), *Flexible learning, human resource and organisational development.* (New York, Routledge).

HARRY, K. & PERRATON, H. (2000) *Higher education through open distance learning.* (New York, Routledge).

LATCHEM, C. & HANNA, D.E. (2001) Processes of organisational change, in: C. LATCHEM & D.E. HANNA (Eds). *Leadership for 21st century learning. Global perspectives from educational innovators.* (London, Kogan Page).

PARKER, P. J. (1998) *The courage to teach: Exploring the inner landscape of a teacher's life.* (San Francisco, CA: Jossey-Bass).

SARASON, S.B. (1989) *The creation of settings and the future societies.* (San Francisco, CA: Jossey-Bass).

The changing identity of 'tutor' and 'student' in the Open University, UK and its consequences for learning and teaching.

Troy Cooper and Sue Hemmings
The Open University in the East of England, UK

Introduction

As a child of the 60s, the Open University UK rested upon the coming together of a number of what have elsewhere (Dale, 1989, Hemmings and Bryant, 1997) been termed 'political repertoires'. At the foundation of the OU UK lay a strong rhetoric of social reform, stressing education as a political right of citizenship, identifying the good of the individual as coterminous with the good (of) society and seeing 'education' as a political tool towards the equal society. Beyond this, the OU appealed to a more radical social transformation agenda, wherein education could become a site where the existing social order could be challenged and institutional barriers to equality overcome. In terms of educational rather than narrowly political thought, what counted as a 'higher education' was barely challenged. The OU UK was built upon the twin educational pillars of humanism and naturalism: humanistic in that it aspired to the nineteenth century university virtues of developing the rounded individual and naturalistic in that it employed the student-centred ideals current in developmental psychology and educational sociology (see for example Morgan, 1993).

Of course there was no necessary link between the repertoires of social reform and equality, and humanism and naturalism. The temporary unity which enabled the (then) revolutionary possibility of offering a traditional higher education curriculum to the masses – regardless of class, gender, ethnicity or disability – was based upon an almost Rousseauan view that enabling individuals to realise their potential would make them ethically 'good'. Education would inculcate values, understanding and desires which would both allow the individual to be happier by leading the 'good life', and create a better society. The eponymous 'openness' of the University was a term used deliberately to mean inclusion – the bringing in and adoption not only of a diversity of individuals into an existing education system, but a diversification of that system in terms of its working and constitution: 'open as to people,...as to places,...as to methods,....as to ideas.'

The social science perspective on subjectivity and identity that we adopt here seeks to link both social and individual identities. It proposes that identities are always contingent - dependent upon the world outside of the individual and tied up in language and culture. Language is not seen as some kind of neutral mirror held up to reflect a pre-existing world but rather as the medium through which the social world is made. The OU UK invites individuals who may have previously had bad experiences in the education system, as well as those who have already achieved, to adopt the identity of 'OU student'. At the same time a range of academics, teachers, trainers and individuals with professional qualifications in other spheres are invited to accept the identity of 'OU tutor'. Our approach concentrates upon the ways in which tutor and student identities are constituted through the social practices including printed and written discourses about them. We focus upon ways in which changes in social practice are changing those identities in disparate ways. In particular this approach contends that language is one of the main vehicles for the construction and exercise of power through construction of identity: who is empowered to speak authoritatively and who they are

empowered to speak about. We prefer the concept of 'discourse' to political repertoire or ideology. This concept enables us to see the ways in which language and action become inter-linked: who has the authority to tell someone to discuss a particular topic and who accepts the position as one who discusses them; who has to submit coursework and who gets to decide if it passes or fails. Discourses, then, are not just about words, they are the important part of what practice or action is taken to mean (Edwards and Potter, 1992; Rose, 1998). The identities of 'tutor' and 'student' are not therefore stable and fixed for all time categories. Rather they are constantly being produced and reproduced through the array of institutional practices from which they derive their meaning.

In the discourses which formed the foundation of the OU UK the education being offered was not a product, which the individual used instrumentally to achieve their own ends. It was a means of self-realisation, of change of the self and identity, and ultimately society - of movement. It was therefore a process – and one which was realised through interaction and transaction with course materials of course, but even more importantly with other students and course tutors (see for example Brandes and Ginnis, 1986). The nature, extent and form of interactivity incorporated in distance education teaching has been seen as indicative of how successful it will be in terms of efficacy, retention and quality of student learning (Holmberg 1989; Evans and Nation, 1989; Keegan, 1996; Juler, 1996). Interactivity with course materials through a variety of techniques has been developed, for example dialogic writing techniques, exercises for the reading student to do, and latterly virtually through new media like CDROMs or with other individuals through CMCs. However what distinguished the Open University from other distance education providers since its inception, and many have argued has been fundamental to its comparative success as a distance education institution (Keegan 1996; Tait A, Sewart D amongst others cited in Rumble, 1989), has been the support and guidance offered by course tutors to students.

Tutors have been employed by the University not simply to teach course content – the written and recorded course materials are designed to do that in stand-alone fashion. Tutors have duties involving face-to-face tutorial time and time for telephone and other forms of contact because they are a key source of interactivity - the other side of a transactional process of learning considered to be key - as Moore (cited in Rumble, 1989) argues – to decreasing the transactional distance the student experiences as dividing them from those who teach them. The point of this interactivity is for students to develop and practise skills necessary to becoming *independent learners* (Morgan, 1993; Ramsden, 1988). This means that they have developed skills of reflexivity about the process of learning which enable them to approach new learning situations with an understanding of how they learn, or what they must do to enable learning and why they learn i.e. how the purpose of a particular piece of learning will inform how it is learnt (Morgan and Holly, 1994). The learning of these skills requires performance by the students – through talk, doing exercises, completing an assessed piece of work – and feedback on that performance. That feedback cannot simply be along the lines of 'good – do this and achieve an even higher level' or 'bad – do this to achieve a particular level'. It must address the student as an individual with particular experience, existing skills, sources of motivation and emotional responses to the consequences of learning – not least success or failure. The best transactional feedback also occurs in the context of a developing knowledge of and history with the student – and indeed until recently, students had a particular tutor who maintained contact with them throughout their University learning career and was informed periodically about the student's progress and learning in any and all courses. And through this transactional relationship it is the tutor who assumes a caretaking, pastoral identity – modelling the students understanding and point of learning, anticipating

intellectual or emotional issues, and providing mentoring for the student as they learn about the style, epistemology and models of a particular part of the academic community. This process been accurately but more lyrically described in detail by Tait (1996) and characterised as 'conversation and community'.

The construction of tutor and student identity.

'...with many hundreds of part-time tutors, for the most part personally unknown to the central academic staff, the OU must procure some minimum standardization of the academic content of tutorials, while at the same time preserving some freedom of choice in teaching methods to encourage the development of an independent critical intelligence in students. Much depends here on the quality of part-time staff appointed, but inevitably tutors, like the students they teach, are bound to experience in varying degrees a feeling of academic isolation' (Castles, 1974).

The Open University has constructed very particular identities for the academics and teachers it employs as part of a mutually reinforcing nexus with its construction of the identity of students. Isolation is the bridge between these identities, and it is the rhetorical rationale for their overt creation. Those employed by the Open University to tutor are located within a set of discourses produced and sustained by a large technology developed for this purpose. All new tutors attend an induction event and are provided from among the ranks of existing tutors with a mentor. Materials available in both paper and electronic formats in the form of the Supporting Open Learners file and interactive tutor Toolkits are provided for new and continuing tutors. Programmes of Staff Development events are run through the network of regional centres and are variously organised on course, faculty and cross-faculty lines. All new tutors are visited by line managers at tutorials during their first two years, the work of all tutors is monitored with written feedback provided and statistical analysis compares the grading practices of tutors on courses. A range of in-house publications keep tutors abreast of developments in the University and tutors and students receive an in-house newspaper. Many tutors first employed by the University comment that they encounter a level of concern with and feedback on their work which they have never encountered before. Much of this technology focuses on sustaining a pastoral role discourse which locates tutors as having duties of care and responsibility for their students.

Correspondingly this discourse produces students as 'not yet competent' and that tutors must often assess the best course of action and negotiate competing interests on behalf of the student. Tutors are given examples within their induction and training material, in public and institutional publications, of students as mature, adult individuals who had embarked on the difficult but (humanistically) desirable path of greater self-actualisation and fulfilment, and of the kind of support they will need to overcome a variety of difficulties. A major source of difference for the construction of Open University student identity is the institutional commitment to taking on students without any formal entry qualifications, and to constructing courses which can be studied part-time and outside of the 'normal' practices which constituted studenthood. The post-second-world war education settlement understood 'students' to be individuals who gain formal qualifications within compulsory education precisely so that, at the age of about 18 (typically) they can move from the family home to study in a different city. 'Student' was a full-time occupation signified by attending lectures and seminars, using an academic library, being immersed in leisure and pleasure pursuits of a particular kind. The 'Open University Student' was a different identity in which an adult learner with a full-time adult life of work and domestic commitments outside of study

struggled to take part in and complete their studies. As time passed this construction has become bolstered by the heroic tales of students who struggle through against near impossible odds. This representation is reproduced in materials for tutors, student recruitment materials and a host of local newspaper stories across the country.

Becoming businesslike: the impact of recent changes in the provision of higher education and the category of 'student'.

This distinctive construction of the OU student conceived of in terms of the founding discourses of the institution is undergoing a challenge from without the institution. Widespread educational and other public sector reforms since the 1980s have shifted away from the social reform and transformation discourses towards a neo-liberalism which stresses individualism and pseudo-market relationships in all spheres of social life. When the OU UK opened, it offered a new possibility for adult learners to achieve a degree level education. The huge growth in the HE sector over recent years has targeted the same groups of potential students as the OU UK. Although most traditional universities insist upon entry qualifications, the growth of access courses has increased the accessibility of full-time HE to students without formal qualifications prior to the access course. In all British universities there has been a growth in the proportion of students in a new category along side 'the student', that of the 'mature student'. Further, changes in the funding of undergraduate study, particularly the withdrawal of the maintenance grant and introduction of tuition fees, has ensured that most 'full-time' students also hold down paid employment.

The old signifiers of 'student' are in decline. For many 'full-time' study is full-time in name only and mainstream universities are increasingly adopting open learning techniques at the expense of the traditional lecture and seminar. Many HE students now choose to study from the parental home rather than travel to a distant university. Indeed, the OU UK is increasingly seeking to make links with schools and to recruit from among the school-leaver population. The growth in student numbers has occurred alongside a discursive shift which places 'the higher education experience' firmly within a vocational framework. This shift challenges the very content of 'education' itself. Initiatives such as foundation degrees are avowedly vocational but more broadly students are encouraged to tolerate student debt as a step on the way to a lifetime of higher earnings. Education becomes a commodity not a process or means of creating better individuals and a better society. Students are viewed as 'rational economic actors' making investment choices to further their own human capital.

In many ways then students in traditional institutions are increasingly like the OU student: both groups share similar social backgrounds and circumstances, both are positioned as consumers by political and marketing discourses, both choose their institution against a background of institutional competition.

The repositioning of teaching and learning in relation to the student-tutor relationship and roles.

This shift in discourses about higher education has in the OU UK led to the opening of a gap in fit between student and tutor identities. In the modelling of Universities as business the transactional nature of learning has been replaced. Internal marketing now talks of courses as 'products', and the student as customers who make choices about whether or not to 'consume' the product. The widespread commodification of education is enhanced within a distance education institution like the Open University by the distance study context. Unlike

conventional institutions, lecture notes for courses are printed up and turned out as stand-alone books and booklets, demonstrations, reading lists and visits or visiting lecturers are produced in booklet, audio or CDROM form. Teaching can be commodified in this way and sent out as concrete, reified bits of education for the consumer. The student positioned as consumer, adopts an identity position in which they must be vigilant in getting the best deal they can, in ensuring that the goods perform as they have been advertised and that they get what they have paid for – in classic economic terms as rational economic actors who both know what their best interests are and act to maximise them. This rationalist model of the student is supported by the ways in which the student is addresses in marketing materials and Student Charters. In addition, an institutional move which has fragmented some of the pastoral and advice role of the tutor by placing support in institutionally based call centres or with specialist advisors, further undermines the humanist construction of the tutor role.

A commodified education positions tutors as part of an after sales service team. Just as with choosing which computer to purchase, the student will look for good advice at the point of purchase, after sales support, reliability, regular software updates a 24 hour support line. Once purchased, if the product fails to deliver, the problem lies with its producer. This discourse thus positions the tutor in a radically different way from the earlier humanist one. The student is no longer 'not yet competent' and in need of pastoral and academic support along a path of individual growth. Rather, the student is the expert consumer of a skills and knowledge package. The tutor is a technician, whose input is to mediate the course in a form that will suit the student – who will tailor the product to be 'fit for purpose' for a particular consumer. The subject position of student then is not one about change and growth but about acquisition and ownership. This fundamentally shifts the basis on which students and tutors understand each other and what they are doing, and a small example of this is the basis for permission to submit assessed coursework later than the cut-off date given for it.

Within the old discourse, coursework extensions were a privilege which students could seek, not a right to exercise. Keeping to deadlines and not having more time to complete assessment than other students who kept to the deadlines were issues of equity and induction into standards and skills of practice of the academic community. Therefore 'good reasons' for extensions were often constructed in terms of the 'heroic narrative' of social transformation, of 'non-traditional' students struggling against the odds to succeed. Students however who find themselves located as consumers do not see themselves as the acolytes within the academic community in which tutors are their guides and mentors, as Mandell and Herman (1996) suggested is necessary to students becoming the owners and producers of learning themselves. They see their tutors as there to ensure that they pass the course by tailoring delivery of the product when necessary. They submit work late without an extension or because 'I've been busy at work' or 'I've been on holiday' or 'I knew I could do the essay better if I took a few more days' as legitimate reasons for late submission, because within the consumerist discourses these are wholly legitimate and indeed rational choices by the expert-consumer.

Conclusion: the possibility of loss of the social agenda in the 'massification' of higher education.

It is neither unusual nor unsurprising that this kind of contradiction should occur. As we stated earlier, there is no necessary or inevitable relationship between political repertoires, educational philosophies or the relationships between groups in the social world. Here, though we are dealing with a contradiction which comes not only from outside of the

institution but which is constructed in and through its own processes. As the gap between subject positions widen this will lead to increasing possibilities of conflict between students and their tutors, but if it works through so that tutors then begin to construct their own positions too in the context of student-as-consumer, a very crucial change in the teaching and learning relationship will take place which may have very negative consequences for other agenda important currently in higher education.

In the earlier part of this paper we raised the issue that interactivity has been seen as crucial to the success of distance learning systems. That interactivity is spearheaded by the tutor who provides tutorials, but also advice, guidance and support on the telephone, by letter or (latterly) via CMC. As we indicated also within the humanistic-naturalistic tradition the tutor proactively models how a student is learning, provides reflection by which the student can become reflexive in their learning and does not simply aid the acquisition of knowledge by the student but their ability to transform it for their own purposes. It is these activities which are of most value to those who lose motivation, have least experience of learning and engage in surface-learning: those who we know from a wide range of research to be at most risk for dropping out. The tutor-as-technician will not construct their subject position in this way at all: their role is to provide customer support for what is requested when it is requested, not to anticipate need or even hold it necessary to inculcate some particular needs.

The danger then of this repositioning of tutors and students is twofold. The first is that the apparent commodification of education demotes or even ignores the process aspect of studying and learning. Successful students cannot be passive 'consumers' of knowledge in studying, they must be active producers of an understanding of knowledge from a course which will allow them to be able to use and apply it in all kinds of new and innovative circumstances. Becoming active in understanding involves working with the knowledge being acquired, and developing reflexivity, is most efficiently accomplished by interaction. However this will not be sought by students who understand their identity to be consumer, or provided by tutors who accept their repositioning as tutor-technician. The second is that the discourse of student as consumer places responsibility with them to act in their own best interests. It assumes that they can identify what those are, and seek access to necessary resources to sustain them. Without the proactive activity of tutors who see themselves as expert members of the academic community charged with providing guidance and support to newcomers coming into it, retention will decrease amongst students least able to take on their 'consumer' responsibilities. These students will certainly be those with characteristics we have found to be those most at risk for dropping out, and are precisely those individuals brought in by agenda for widening participation.

Many demands are currently being placed upon Higher Education key among them those encapsulated by the discourses of 'widening participation' and 'lifelong learning'. These demands in many ways articulate with the core historical values and objectives of the OU UK. Although the traditional model of education has many elements of paternalism and elitism within it which at other times in other places we might criticise, we do not see the market model of educational commodities as democratic or promoting opportunities in the way its proponents would suggest. Rather alongside the 'massification' of education we are seeing an increased retrenchment, through the market model and the discourses and identities it produces, of another 'closed' system which will still have the effect of privileging the already-privileged and narrowing participation. It may also have the effect of undermining the development of precisely those learning and academic-intellectual skills which must underpin the success of any 'life-long learning' agenda.

References

BRANDES, D., GINNIS, P. (1984) *A Guide to Student Centred Learning* (London, Basil Blackwell)

CASTLES, F. (1974) Divide and Teach: The type and division of labour, in: J.TUNSTALL (Ed). *The Open University Opens* (London, Routledge and Kogan Paul)

DALE, R. (1989) *The State and Education Policy* (Buckingham, Open University Press)

EDWARDS, D., POTTER, J. (1992) *Discursive Psychology* (London, Sage)

EVANS, T., NATION, D. (1989) *Critical Reflections on Distance Education* (Lewes, Falmer, Press)

HEMMINGS, S. & BRYANT, L. (1997) Education, in T.SPYBEY (Ed) *Britain in Europe* (London, Routledge)

HOLMBERG, B. (1989) *Theory and Practice of Distance Education* (London, Routledge)

MCINTOSH, N. (1974) The OU student, in: J.TUNSTALL (Ed). *The Open University Opens* (London, Routledge and Kogan Paul)

KEEGAN, D. (1996) *Foundations of Distance Education* (London, Routledge)

JULER, P.(1996) Interaction in Open and Distance Education, in: H801 Block 1 'Theory and Practice for Open and Distance Education' for Foundations of Open and Distance Education in the MA in Open and Distance Education (Milton Keynes, Open University)

MCLEAN, M. (1990) *Britain and a Single Market Europe: Prospects for a Common School Curriculum* (London, Kogan Page in association with The Institute of Education, University of London)

MANDELL, H.L. (1996) From Teachers to Mentors: acknowledging openings in the faculty role, in:A.R.MILLS & A.W.TAIT (Eds). *Supporting the Learner in Open and distance learning* (London, Pitman)

MORGAN, A. (1993) *Improving your students' Learning: Reflections on the experience of study* (London, Kogan Page)

MORGAN, A. & HOLLY, L. (1994) Adult change and development: the interactions of learning with people's lives in G. GIBBS (Ed) *Improving Student Learning: theory and practice*

RAMSDEN, P. (1988) *Improving Learning: New Perspectives* (London, Kogan Page)

ROSE, N. (1998) *Inventing Ourselves: Psychology, Power and Personhood* (Cambridge, Cambridge University Press)

RUMBLE, G.(1989) 'Open Learning', 'distance learning' and the Misuse of Language. *Open Learning*

TAIT, A. (1996) Conversation and Community: Student Support in Open and distance learning, in: A.R.MILLS & A.W.TAIT (Eds). *Supporting the Learner in Open and distance learning* (London, Pitman).

TUNSTALL, J. (Ed) (1974) *The Open University Opens* (London, Routledge and Kogan Paul)

Psychiatric Nursing: Access, Flexibility and Convergence?

Gail Crawford,
Athabasca University, Centre for Distance Education, Canada

Introduction and Context

Distance education for nurses in Canada has a long history and record of considerable success; degree level education for nurses is usually available to diploma nurses. That is, most programs for nurses consist of roughly two years of study after the completion of a diploma-nursing program. For the most part this means curricula addressing theory, administration, research and teaching and includes little clinical or applied curricula. Further, in Canada in many regions, degree level qualifications for nurses have been the criteria for entry to practice since the year 2000. Hence, both degree level qualifications and distance study for nurses are well established in Canada.

The focus of this paper, degree level programs in psychiatric nursing, differs from other distance education in nursing in several important ways. First, psychiatric nursing has a relatively short history in the university environment. Indeed, only in the western provinces is a bachelor's degree in psychiatric nursing available. In most other parts of Canada psychiatric nursing is available only as a graduate degree program. Second, most of the psychiatric nursing diploma programs continue to exist within colleges and only ONE university in Canada offers a bachelor's degree in psychiatric nursing. Thus, degree level psychiatric nursing education is relatively new and uncommon in the university environment. In addition, the one institution in which this program resides is a liberal arts university in which professional and applied curricula are relatively uncommon and in which distance education has only recently been implemented. The University offers a four-year bachelor's degree as well as two post-basic programs in psychiatric nursing.

Underlying Factors

The initiation of distance education in this environment was precipitated by a number of circumstances involving the University, the students, and changes in the socio-political climate. The University in question is located in a small western Canadian city. Historically, the institution has been renowned for its music program but it also offers a full range of arts, science and education programs. The University's Mission emphasizes service to citizens in the rural and remote regions of the province and it gives considerable priority to ensuring that graduates achieve high levels of literacy and competence in the use of computer technologies.

In the past students could enrol in one of three psychiatric nursing diploma programs located in health and development centres in the Province. For decades enrolments in these programs ranged around 100-150 students per year and applicants consisted of well-qualified and well-motivated students many of whom had previous university credit with up to 10% having a previous university degree. Between the mid-1980s and the mid-1990s, all three existing psychiatric nursing programs were either closed or relocated to the University. In the past few years the numbers of applicants has dropped precipitously, by as much as 50%. Demand for graduates remains high but numbers of graduates falls short with approximately 20-30

students graduating per year while the nursing associations indicate a need for at least 50 new degree graduates per year.

Canadian geography is variable, complex and enormous. Population densities are highest along the Canada/US border but are widely dispersed and small in numbers throughout much of the country. Local, regional and national governments are under pressure to improve access to educational services in the smaller, rural and remote regions. Recent attempts to improve these services include initiatives such as Campus Manitoba (CM) in Manitoba and Canadian Virtual University (CVU) federally. These are enterprises that are expanding both technological and human infrastructures to ensure wider access to electronically supported post-secondary education throughout the province and the country.

Barriers to Distance Education

A number of barriers in the province of Manitoba exist, specifically in terms of the University structure and organisation, among the university faculty members, among the students, and with respect to the curriculum itself. The University is a conventional campus-based institution with few of the kinds of services and little of the infrastructure that is necessary to support distance learners. While changes are in progress, the fundamental attitudes towards distance education are less than supportive overall. In addition, the relatively new professional programs in psychiatric nursing may not be well understood or have strong, vocal or political support within the University community at large.

For the most part, the Faculty members are experienced nursing educators; only three have recent distance education experience and credentials. Distance education program development began with considerable trepidation, anxiety and some levels of resistance among them (Ek, Ryan-Nicholls, & Matheos, 2000). Faculty members expressed concern about the complexities of course development, anxieties about how well their particular curriculum could be taught at a distance, frustration about how little support was available to them, concern about a significantly increased workload and ambiguity about whether their efforts would be adequate and payoffs sufficient. A few Faculty members expressed the fear that distance education courses could be delivered by instructional assistants, thus potentially replacing them in their positions.

The students similarly expressed mixed messages about early distance education offerings (Ryan-Nicholls, 2000). There were many positive opinions from students who clearly appreciated the flexibility of the distance education options and valued the distance education materials. However, students were also frustrated at the lack of consistency and predictability across courses, at the lack of orientation, training and experience and at the failures of technology. A few students noted that they paid to be 'taught by teacher and not by machines'. In one situation, an attempt was made to use the distance education course online materials for campus-based students and this caused some level of disruption especially among inexperienced students.

Psychiatric nursing curriculum prepares graduates to maintain, promote, and restore health, especially mental health of individuals, families, and groups. Of particular importance is the 'application of therapeutic levels of interpersonal relationship skills and the development of a therapeutic milieu to promote positive change' (Ek, Ryan-Nicholls, & Matheos, 2000). Psychiatric nursing uses a systems approach including: assessment, planning, implementation and evaluation, to assist people in meeting their psychosocial, physiological, and

developmental needs. Thus, courses require conceptual, theoretical, clinical, laboratory and applied approaches - these tend to be both difficult and expensive to deliver at a distance.

Increasing Access and Flexibility

Over the past several years, developments have continued with respect to making the psychiatric nursing programs both more accessible and more flexible. Achievements are being made with respect to increasing course availability, increasing faculty experience and confidence, increasing flexibility for students and improving infrastructure and support.

With approximately nine courses required each year of study, distance courses are available for: 8/9 first year courses; 6/9 second year courses; 5/9 third year courses; 6/9 fourth year courses. At the same time, across the four years of the program, 9-10 courses have clinical, practical or laboratory components. Some of these have been developed for distance delivery; however, their delivery is constrained by clinical, practical or laboratory components. To date, the most cost effective means of providing these courses is by offering the course on-site in another location. For the most part this works exceedingly well in the major urban centre in the Province and occasionally enrolments can justify on-site delivery in a few other centres.

The Faculty members still have some concerns about conflicting goals and priorities; however, the majority in the psychiatric nursing program have participated in and/or produced online and/or distance delivery materials and appear to be becoming more comfortable in their use. Students are also becoming more comfortable with the online and distance education materials and some courses are now being offered to both campus-based and distance students. Some print materials and other media are available through the bookstore and can be purchased by students. Course and student manuals are in development to facilitate student management of the study processes, to alleviate the potential confusions over course and program standards and expectations, and to ensure that general information is readily available and communicated to all students. Attempts are being made to develop an institutional format giving 'face' to the materials and processes and consistency for students.

Recently, significant increases in applications for admission have been received. Many of the applications are from candidates wishing to study in a large urban area. While the reasons for reduced application numbers in recent years are not known, it is possible that migrations from rural to urban areas and with the closures of large psychiatric hospitals that tended to be located in small towns and cities were contributing factors. Reasons for the current increases in numbers are unknown; however, it seems important to find mechanisms to accommodate more of them.

Some problems in organisation and infrastructure still occur, for example, with respect to: registration processes, procedures and timeliness; pre-registration information and advising; course development processes; workload/payment arrangements; clinical/practical/laboratory courses; and copyright issues. The latter may have significant consequences over time. Again, it seems critical to ensure that these issues get resolved.

Forces Driving Convergence

At the outset, when distance education course development began in the psychiatric nursing programs, it was intended by the Faculty to run 'dual mode' programs with the campus-based

and the distance students as separate entities. However, this does not appear to be happening, indeed, it appears that the process of convergence as articulated by Mills and Tait (1999) is proceeding quite rapidly. Predictably, convergence appears to be increasing student access to a range of study modes. Increasingly, campus-based students have access to online and print materials and to other media such as audiotapes and CD ROMs originally designed for distance learners.

In addition, increasingly, campus-based students are participating in the online WebCT activities originally meant for distance learners. Indeed, the number of distance students is small and kept so because they cannot be assured access to the four-year degree programs entirely at a distance. This concern to increase access but avoid implying full distance delivery of the programs is one of the factors that supports a mixed mode rather than a dual mode approach and which increases the probability of convergence between the campus-based and distance programs.

While the original plan with Campus Manitoba (CM) and the Canadian Virtual University (CVU) was to provide the four-year psychiatric nursing degree program at a distance, the Faculty have actively resisted making that commitment. Rather, they would prefer to increase their off campus enrolments at the large urban site. To make this academically and financially efficient and effective, the Faculty members are using the distance education materials and resources to provide the satellite campus students access to the majority of the curriculum and offering the clinical, applied and laboratory courses face-to-face at that site.

As with many nursing programs, the psychiatric nursing program continues to struggle with problems in the organisation and location of clinical placement facilities. In urban centres numerous clinical placements are required by many different program groups such as nurses, dieticians, pharmacists, social workers, and etc. Competition is often quite severe. In the smaller centres, such facilities are small in number. Further, until quite recently supervisors and preceptors have not been remunerated for their services; however, this may be changing.

In the context of an increasingly diverse student population; increasing competition from other types of programs and other kinds of opportunities for students; and, increased requirements for students to pay more of their educational costs, students also are becoming more demanding of the educational opportunities. Often, as argued by Powell, McGuire & Crawford (1999), these demands include requirements for flexibility of schedules, customization of programs and access to resources in a variety of ways. Some of the current psychiatric nursing students may be a little older than the conventional 18-24 year olds, more likely to have family responsibilities and less likely to have time or inclination to spend hours on the campus, meet colleagues in the coffee shop or cruise the student pubs. These students may also be more goal-centred, want efficient and effective access to educational opportunities and, most especially, flexible scheduling and better access to courses and programs.

Given the unique curriculum in psychiatric nursing programs and the existing WebCT/distance education courses, it is possible for all program students to be offered a 'technologically enhanced' learning experience that increases their flexibility, offers new learning resources, and better prepares them for continuing and lifelong learning using communications technologies. Some adjustments may be required for those students who have enrolled at a distance; however, as long as the numbers remain modest, this should not be an overwhelming problem. Such a strategy may enable the programs to achieve economies

of scale and make it cost effective to serve a wider variety of student populations, thus further increasing access.

The uniqueness of the Bachelor of Science in Psychiatric Nursing (BScPN) programs, and the demands for psychiatric nursing skills outside the urban areas, argues for the expansion of these programs to a broader audience. The BScPN program, could indeed, become an exemplar of a mixed mode delivery in a small conventional university and prove to be the 'testing ground' for further developments at this and other institutions in this and other applied programs.

Harry and Perraton (in Harry, 1999) argue that three factors underlie the convergence between distance and conventional education: a drive for dual-mode status, technology and new audiences. Jefferies (1995) suggests that 'the field of distance education is in a constant state of evolution' with a 'stream of new ideas and technologies balanced against a steady resistance to change'. 'History shows non-traditional education trying to blend with traditional education while striving to meet the challenge of constantly changing learning theories and evolving technologies'. It appears that in the context of these programs in one institution, dual mode may give way to 'mixed mode' in a 'natural way'. Technology may become available and sustainable for reasons of public and educational policy. In addition, social conditions such as the closing of residential psychiatric facilities may contribute to attracting different types of applicants to the psychiatric nursing programs, from both urban and rural environments. Such increases and broadening of applicants could further drive the processes of convergence.

According to Moran & Myringer (in Harry, 1999) the movement of universities towards a more flexible learning environment is more than a 'simple evolution'; rather it reflects the 'unsteady, problematic, profound process of change under way' (p. 57). According to them, the convergence between traditional face-to-face and distance education methods is 'strongly influenced by new electronic technologies' and, as in this case, 'reduced funding, advancing technology and the demography of students may be forcing a paradigm shift' (p. 58).

Summary and Conclusions

It is argued that the development of distance education within one conventional university program in one professional curriculum area exemplifies the process of convergence between campus-based and distance education. Indeed, it may also reflect what could be an emerging phenomenon concerning the use of a mixed mode approach to meet the needs for increased accessibility and flexibility. Convergence between distance and campus-based university level education appears to be a 'natural process' in this context. In some ways, this particular University may seem an unlikely 'innovator' for mixed mode delivery given its history of residential study, small city and relative lack of experience with technologically supported education or professional schools. In other ways, perhaps it is the most logical place for such innovations to emerge. While larger Canadian universities do make use of mixed mode strategies and communications technologies, this small University appears to have embarked on innovations that a larger institution might find impossible.

There appears to be a certain timeliness with respect to the Provincial and Federal government expansions of technological services, which may have both positive and negative impacts. These events provided access to new resources while also exerting pressure for development that may not have been timely. The circumstances of reduced enrolments when

the programs were especially vulnerable having been recently relocated from health centres into a university milieu also contributed to the decision to engage in distance education at that time. While dual mode distance education may not be 'on the cards', the program Faculty has accomplished some impressive feats. Further, the programs may contribute in unexpected ways to the development of mixed mode educational opportunities in a small Canadian University. It will be interesting to observe over time and to see how well the use of mixed mode strategies serves all of the stakeholders in this process.

References

CAMPUS MANITOBA (2003). Web site providing access to post-secondary education in the Province of Manitoba, Canada. [online] Available from: http://www.campusmanitoba.com/ [29 April 2003].

CANADIAN VIRTUAL UNIVERSITY (2003). Web site providing access to post-secondary educational consortium across Canada. [online] Available from: http://www.cvu-uvc.ca/english.html [29 April 2003]

EK, N, RYAN-NICHOLLS, K. & MATHEOS, K., (2000). First two years of psychiatric nursing by distance: what's working, what's not. Paper presented at the conference of the Canadian Association for Distance Education (CADE), Quebec City, Quebec.

HARRY, K. & PERRATON, H., (1999). Open and distance learning for the new society, in: K. HARRY, (Ed.). *Higher education though Open and distance learning: World review of distance education and open learning* (Vol. 1). London, Routledge/Commonwealth of Learning, 1- 12.

JEFFERIES, M., (1995). IPSE - Research in distance education. [online] Available from: http://www.ihets.org/consortium/ipse/fdhandbook/resrch.html [15 March 2003].

MORAN, L. & MYRINGER, B., (1999). Flexible learning and university change. In: K. HARRY (Ed) *Higher education though Open and distance learning: World review of distance education and open learning* (Vol. 1). London, Routledge/Commonwealth of Learning, 57-71.

POWELL, R., MCGUIRE, S. & CRAWFORD, G., (1999). Convergence of student types: Issues for distance education. In: A. TAIT & R. MILLS (Eds) The *Convergence of distance and conventional education: Patterns of flexibility for the individual learner.* London, Routledge, 86-99.

RYAN-NICHOLLS, K., (2000). The B.Sc.P.N. Program at a distance: Learner perceptions. Paper presented at the conference of the Canadian Association for Distance Education (CADE), Quebec City, Quebec.

TAIT, A. & MILLS, R., (Eds.). (1999). *The Convergence of distance and conventional education: Patterns of flexibility for the individual learner.* London, Routledge, 1-4.

Notes:

The author would like to convey her appreciation to Kim Ryan-Nicholls, Assistant Professor, Brandon University School of Health Studies for her assistance in this activity.

The Culturally Diverse Malaysian Distance Learners. Are the Chinese Distance Learners Different from their Malay Counterpart?

Hisham Dzakiria and Rob Walker
University of East Anglia, UK

Introduction

Generalising a certain culture or group of distance learners (DLs) as *homogeneous* does not facilitate the educational experience of the distance learning. However, having insights and understanding of most prevalent obstacles which troubled the DLs from different cultures, and the strategies they used to cope with such problems may be helpful in assisting the DLs to make an academic transition to study at a distance. Becoming aware of, and valuing the cultural factors that underpin the academic transition of the different groups of DLs, would be of great benefit in having mutual understanding and respect in achieving successful and satisfying educational experience of learning at a distance. We strongly believe that it is only when the DLs' previous educational experiences, culture and values are understood, acknowledged and valued, that the DLs' educational quality is most likely to be facilitated.

In Malaysia, culture is believed to play an important role in developing learners' perspectives on teaching and learning at a distance. The nature of the *teaching-learning* materials and the *teaching-learning* interaction, and the learner support can be shaped by their cultural contexts, practices and traditions. In addition, what counts as 'educational quality' differs not only according to the context and the course providers, DLs, and distance teachers (DTs) but perhaps also by cultural beliefs, perspective and practices which may come with their own sets of goals, expectations and perceptions.

Therefore, in trying to understand the role of culture in shaping perspective and practice on distance learning, this paper focuses on culturally diverse Malaysian DLs at the University Utara Malaysia (UUM) and examines ways in which culture informs the DLs' perspective, behaviour and practices in distance learning. In addition, this paper will also examine the needs of these culturally diverse learners that need to be considered for the design of distance instruction and learner support.

Research Background

This qualitative case study focused on the experience of a small number of students in a distance learning program at University Utara Malaysia (UUM) as part of a close case study of distance learning careers over a period of time. Twelve active DLs were selected and participation was on a voluntary basis. 8 males and 4 females were involved. Out of the 12 learners, 7 were Malay and 5 were Chinese students. The average age among the respondents was 35. All of them were approached individually and briefed on the study, the objectives, the consent procedures and the ethical consideration(s) taken by the study.

The DLs' descriptions of their distance experiences of study provides knowledge about students' learning that is holistic rather than course specific. This paper looks at *the role of culture and its effect on learning*, an issue that arose from discussions with the DLS, rather

than being preordained by the research design or derived directly from our own initial interest as distance educators and researchers.

Research Objectives

The ultimate aim of the study is to improve the distance learning programmes at University Utara Malaysia in the future.

Methodology and Research Approach

An instrumental qualitative case study (Stake 1995) approach was employed so as to understand the experience of individual learners as they progressed through their study careers. The research used three different research instruments: the interview being the primary instrument, supplemented by student journals and photographs. All the DLs involved in this study were interviewed on a one-to-one basis during 2002 academic year, and this was the basis of the data reported here. All the interviews were conducted in Bahasa Malaysia with minimal code switching between Bahasa Malaysia and the English language.

Findings

Within the two groups of DLs, there was a range of past social and educational experiences. Such a range of backgrounds gives a broader perspective to the responses which have emerged from the interviews. Preliminary analysis indicates that the DLs in this research found the expectations and learning environment governing distance learning were considerably different to those evident in their previous educational experience and study environment. Most reported that the new learning environment and expectation governing the academic culture of distance learning were not only different, but also implicit. In other words, it appeared to the DLs that they were expected to conform to certain patterns of behaviour, which were seldom consciously and explicitly made clear to them.

Following are detailed discussions based on different sub-themes that surfaced in the study presented by the DLs.

Defining Success in DE

The DLs' concern at UUM was to get through the learning materials and complete the course requirement successfully. However among the Chinese and Malay DLs studied, there was of course variation in learning approaches and expectation.

When asked to share their thoughts on what they mean as 'completing the distance courses successfully', the majority of the Chinese DLs say that *successful* entails not only a good grade and achievement that will lead to an honours degree, but a good understanding of the knowledge and the courses in general. This seems to suggest that their learning is not merely learning to get through the exam and course, but it involves some degree of deep learning, that is to have a good grasp and understanding of the courses taken. This principle of learning as evident in the data seems to suggest that the Chinese DLs used it as a learning 'framework'.

The majority of the Malay DLs in this study show similarities in expectation. They define success in their distance learning as completing the courses and programs and gaining the

degree. However, their stress was more on 'getting the paper qualification required' as opposed to obtaining a first class or honours degree. What matters most, as indicated by the following discourse, is finishing the program and getting the degree:

> With commitments, responsibilities that I have, you can not expect a student like myself to have the same energy like the campus based learners to work hard and excel in their studies with flying colours. My objective is getting through. I will be the happiest person on this planet just to get my degree...and if that means a second class, then that is fine. I still get (hopefully) the promotion that I want with a second class degree. Salina

Role of Study Group

Another significant topic of discussion that we had was on the role of the study group in distance learning. Both groups believe that the study group is useful but placed different weightage on their importance and relevance in DE.

The Chinese DLs see it as imperative to build and sustain a study group throughout their distance learning experience, but the Malay DLs as evident in the data seem to use a study group using the 'just in time' approach (JIT) i.e. when there is an assignment to submit or a presentation to perform, etc. For the Chinese DLs learning is information collecting activity shared amongst the group as evident in the following discourse:

> Studying is important, but equally so having a good, effective study group is also vital. I have study group for majority of the courses I take each semester. It helps. We work and help each other. Being a business person, learning, and learning successfully mean having a good network of friends or other learners. Just like in a business environment, networking is crucial and plays an important role in supporting your business. Distance learning, or any learning for that matter is no different.
> Andrew

The study group is important to the Chinese learners particularly for activities pertaining to reading, discussion and understanding of the course material as depicted in the following discourse:

> I use my study group more to help me not only for the purpose of completing course tasks and assignment and preparation for examinations, but most importantly to help me understand with my reading and learning the content of the courses that I take. Reading is an important component, but I also believe that reading in isolation sometimes is difficult...especially if materials are in English or Malay. Being Chinese I am not good in the national and second language, we need friends to help us with our understanding of the readings and materials presented
> Lee Seng

In their description of their learning styles the Chinese DLs tended to focus on reading widely (refers to reading of extra materials) and discussion on the materials learned was believed to provide more information and better understanding to their learning. This in turn was perceived to be the key to successful learning. Reading among the Chinese learners according

to Kember, (1996, Kember and Gow, 1990) is used by the learners as a step towards reaching understanding of the learning materials,

In many ways, The Malay learners also agree with this notion. However, they stressed that they do reading and 'lots of it' if time permits. Otherwise their learning is more dependent on the face-to-face (f2f) meetings, the modules provided, and the lecture notes taken. In addition, they say that they gained useful information from the f2f meetings, then followed their advice and instructions. This, they say, helped them deal with their learning at a distance.

The Chinese DLs using the study group strongly believe that reading and discussion of the materials in the distance courses is highly valued and commit themselves to extra efforts collectively in pursuing extra readings and materials relevant to the courses taken. The Chinese DLs' perception was that the information gained from readings and discussion enhanced the understanding of the course content. In addition, when talking about the importance of the examinations and doing well in them, they stressed that giving more information and examples in the examinations and assignments and essays would give them a better leverage to excel in the courses taken. This is where readings, extra work, group work and discussion play a role in their learning.

Building on the need to have a good network of learners, the Chinese learners see learning as collective work from the start. Many of the DLs in this study confessed the desire to build the 'right' study group as early as week one or two when the semester begins.

> Being a distance learner, you can't wait. You need to start building the learning network or study group...as soon as possible. Besides the support that you get from the institution, the study group is equally an important support system that I can not do without.
>
> Lee Seng

Nevertheless, one common problem that the Chinese learners had was to ensure they have an effective group which denotes having study peers that could contribute in the learning process and are capable of helping each other. Some of the Chinese learners resolve this problem by initiating study groups with friends and other learners whom they have known for some time. From the discussion that we had, the Chinese DLs were selective in choosing their study group mates. On most occasions, each member is expected to perform, committed to the group tasks and assignments and able to work collectively to achieve group objectives and expectations.

Individualistic Versus Collective Learning

The dependency of group work and study groups between the UUM Chinese and Malay DLs suggest the two groups can also be seen in light of the distinction of *individual* versus *collective*. This distinction refers to the role of the individual and group, and which interest prevails over the other. In many respects as evident in the data, the Chinese DLs employ more of a *collectivist/group Orientation* compared to the Malay DLs. The "we" as exhibited by most of the Chinese learners is the source of identity, protection, loyalty, and dependent relationship. To an extent, learners who deviate from the norm are considered as "having bad or weak character" and may face more challenges in their courses. As Andrew puts it, "We

the Chinese students I think cannot learn in isolation, we need each other to help each other in our learning".

On the other hand, many of the Malay DLs in the study displayed an *individualist orientation* towards their learning. This orientation or approach refers to the interests of the individual prevailing over those of the group. They are characterized by individual and personal characteristics rather than by group. The ties between individuals are very loose, everyone is expected to look after him/herself. This dimension is based on the amount of time available for learning. The Malay DLs had always identified time and the lack of it as a common barrier. It is the lack of it that inhibits them from having a study group like the Chinese DLs. When introduced to the idea that every learner has twenty fours hours a day, seven days a week (24/7) and yet the Chinese DLs were able to commit and promote study group as a learning strategy, one of the Malay learner confessed that:

> In many instances it is about attitude. I think the Malay learners in general are too complacent with the privilege we get from the government, the scholarship, the chances, etc. So much so we spoil ourselves by being less motivated than the Chinese learners. They work harder because it is harder for them to get scholarship and access to HE. Yes we have 24/7 but if you ask me, I don't and can not put my distance degree top on the list of priorities. I have a big family and a job to think about 24/7. My degree comes third. I think this is why I always blame time for the shortcoming in my study.

Learning among the Chinese DLs is therefore a process where the individualistic is important, but a collective work that requires discipline, self directedness, independence, sense of responsibility, attention, hard work, persistence, motivation and time is equally important.

Unlike the Malay DLs, the Chinese DLs were able to disregard the influence of their former educational experiences (being teacher-centred) and developed a conception of distance learning based upon the current circumstances they are in. The major difference was that, while the Malay learners were highly dependent upon their DTs, the Chinese learners in this study showed significantly greater levels of independence and self direction. Some of the Chinese learners set their own learning objectives and displayed a higher level of control over their learning. It almost seems that the Chinese DLs did not always wait for direction from their DTs, but were willing to take the initiative themselves. Andrew for example, described his role as a learner as knowing what to do

> not just for the next lesson but what are the things, assignments and readings that need to be done throughout the semester. Then, planning your learning and doing the tasks required systematically.

Such evidence shows that the Chinese learners like Andrew and others had to show flexibility and use different learning strategies as needed and view the DTs more as facilitators as opposed to teachers giving lectures. The DTs'-DLs' relationship was more interactive since frequent discussion with instructors helps. The Chinese DLs recognise that they could learn both from their DTs and other DLs through class discussion and other group activities.

Interestingly such behaviour was said to be culturally cultivated. According to Lee Seng:

> This has been the way the Chinese learners in general work. Studying has been a competitive endeavour right from the primary up to secondary and higher education. We have to be the best and get the top grades to enrol in public university. Of course if I or my family or parents were rich and had the money, I could have enrolled into private institutions, but the reality is I am not, so public university like UUM was the only option I had and more affordable...but difficult to get into. We are not as fortunate as the Malay learners who have many scholarship and opportunities, we realised that, and one way ahead is to work hard. This principle is what we hold from one generation to the next. I am doing it, I am telling my children to work hard...and on top of that it is much more challenging for us because Bahasa Malaysia and English language is not our mother tongue and this itself is a barrier...we simply have to work hard and get as much support from our friends as well.

The Malay DLs on the other hand, explained that 'ideally' distance learning was not for them. Given a choice and if permitted, they would prefer full-time based education in which the teacher would cover the concepts, direct them to specific sources and tell them what information to look for and be there to provide immediate feedback to questions. In this respect, past experience of learning and teaching have some influence on the UUM Malay DLs. The Malay DLs realised that they had to become independent learners but felt that they had been unfamiliar with such expectation especially in the earlier academic semesters of their distance course. The Malay DLs felt the need to attend classes. In these they needed to be attentive to the DTs' presentation, lectures, so that they ended up with good notes. They recognised that a good distance learner works hard, prepares for classes and reads all relevant readings. Nevertheless, it is hard to meet these ideals due to the conflicting demands they face being adult DLs as mentioned earlier. These Malay learners see knowledge as being defined by an external source by a combination of the DTs' and the course content. The DTs are expected to present the content to them, and that is to be learned and absorbed and reproduced during exams and tests. It is not surprising that this view is common, as their conceptions of learning would have been formed by the 12 years of Malaysian educational teacher-centred dogma.

Nevertheless, not all Malay DLs conformed to the above learning strategy. 5 out of the 7 Malay learners believe that the DTs play a very important role in their learning. However, the other two deviant cases conform to the Chinese DLs' way of learning. This shows that not all learners (Chinese or Malays) conform to the generalisation made based on ethnic background; rather, each individual learner is unique and may vary even in the same culture. Understanding the learner is what matters most.

Short versus Long Term Orientation

In addition to the findings above, the Chinese and Malay DLs show distinct *Short-Long Term Orientation.* This dimension was related to persistence and perseverance. The majority of the Chinese DLs displayed a long-term orientation (dynamic, future oriented). This includes characteristics such as: adaptation of traditions to modern context, respect for tradition, perseverance toward slow results, willing to subordinate oneself for a purpose, and concern with virtue. The preference for building a learning network among DLs is a manifestation of such orientation - a need to plan the learning and accomplishment of the course tasks and assignment ahead of time.

The Majority of the Malay learners in this study displayed a short-term orientation towards their learning. They don't necessarily plan much ahead of the time required to perform on the learning tasks and assignments. This is validated by their sense and the urgency of forming a study group which should be based on necessity or JIT and priority and with clear intended purpose i.e. to help complete assignments and tasks.

Discussion

The academic transition experiences required by the Chinese and Malay DLs to achieve success in their distance learning appear to be significant and have many cultural and individual aspects. In some circumstances, cultural differences significantly impinged upon the educational quality and academic transition experiences of those Malay and Chinese DLs at the institution; however, there is some commonality evident that underpins these unique personal experiences. Most of the DLs went through the initial stage of feeling lost, but then felt more confident and more settled later. A few initially experienced excitement because of the new environment or new freedom compared to the more structured previous educational experience, then become concerned as they realised the magnitude of the hidden academic demand expected of them and the need to develop new coping strategies.

Many of the Chinese DLs interviewed attributed language as the cause of the difficulties of their academic experience. This is perhaps because language was the most obvious cause identified rather than the course itself. All courses have their own challenges and difficulties but these can be resolved.

The Malay learners affiliated their status as adult learners with the many roles and responsibilities they have, and the lack of time as their common problem in learning.

Many of the DLs adjust by making more effort, spending more time on study. This is evident more so in the Chinese learners than the Malay learners. Such effort is consistent with research findings at other universities (Burke, 1986). Some of the DLs regard the adjustment experience as a form of personal development.

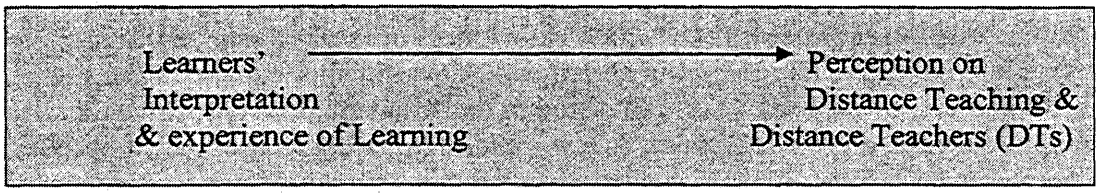
DTs may argue that it is obvious that different cultures learn in different ways and that some cultures have approaches that others do not. However, rather than being a product of culture as such, this may have a logical explanation of past learning experience (how the learners have learned to learn) and the context in which decisions have been made for further learning (i.e. economic pressures, job prospects, the importance of paper qualification, etc). Although these may be influenced by cultural factors, these decisions may be more practically based than culturally determined. Rather the nature of different education systems means that DLs in different parts of the world may have been exposed to different learning methods.

Summary

Findings of this study suggests that there is no one interpretation that can stand alone as an interpretation or generalization that one can make on culture and its effect on learning for the Chinese or the Malay learners at UUM. Within the DLs themselves there were deviant cases that do not conform to the cultural group he or she belongs to. This strengthens the fact that DLs are heterogeneous, not only among and between learners, but also between one cultural and ethnic background.

However, DLs' perception of distance teaching as evident in this study is seen as more affiliated to the learners' conception of learning. The DLs shape their interpretations of what learning and teaching is around their existing cultural beliefs, knowledge and practices that were based on the educational experience that they had. The Malay and Chinese DLs' perception of DTs and teaching as evident in this paper (shown in the following diagram) is heavily reliant on their interpretation of their perception of learning.

Diagram 1: Perception on Distance Teaching Determined by Learners Interpretation of Learning



Having this in mind, DTs must employ a variety of teaching strategies to accommodate cultural differences and variety of learning style preference. In general, when trying to accommodate cultural differences and variety of learning styles in the instructional design, it is always best to design alternative activities to reach the same objective and give the DLs the option of selecting from these alternative activities which best meet their preferred learning styles.

References

KEMBER, D. (1996), The intention to both memorise and understand: Another approach to Learning?, *Higher Education*, Vol.31: 341-351

KEMBER,D. and GOW.L. (1990), Cultural specificity of approaches to study, *British Journal of Educational Psychology*,Vol.60: 356-363.

STAKE, R.E. (1995), *The Art of Case Study Research*. Thousands Oaks, California: Sage.

The future of student retention in Open and Distance Learning

Graham Gibbs
Student Support Research Group, Open University, UK

Introduction

This paper summarises the content and outcomes of a symposium entitled 'Student retention in Open and distance learning' held in Cambridge, England, in May 2003. The symposium involved discussion of six papers, circulated in advance, and an additional day of discussion around a number of themes, involving a selected group of expert participants from several countries and contexts. Three of the papers derived from open learning contexts and concerned: theories of retention; student and systems features associated with poor retention, and evidence of the impact of interventions to improve retention. Three of the papers concerned retention in conventional contexts and concerned: retention in UK higher education; adult persistence in post-compulsory education, and evidence from the 'First Year Experience' initiatives of the past 25 years that have attempted to improve college retention in the US. It was hoped that the more extensive and mature research into retention in conventional contents would provide useful insights into retention in ODL where there is more limited theory and less empirical evidence.

A web site http://kn.open.ac.uk/workspace/index.cfm?workspacepageid=1878 was used to debate papers beforehand and to post the products of working groups afterwards. The products concerned: the roles of institutions, course designers, tutors and students in improving retention, improving retention at the programme level, improving retention by being less open, a typology of students, and conceptual frameworks for bringing together theory and evidence about retention.

This paper will draw out some of the key insights from what was a thoroughly engaging and creative symposium.

Background

Student retention has tended to be poorer in Open and distance learning than in conventional higher education contexts and improving retention has proved a relatively intractable problem. For example the Open University (UK) has repeatedly missed its targets for improved student retention despite an extensive institution-wide initiative and substantial funding for student support interventions. This apparent lack of progress must be seen in the context of entry of ever wider varieties of students with ever more varied educational backgrounds and more pressing needs, and also more fickle and discriminating consumerist attitudes to educational products and services. Is retention in ODL going to get even worse? A review of research on Open and distance learning published by the American Journal of Distance Education has highlighted the lack of insights from research into student retention (Berge and Mrozowski, 2001). Most evidence about retention (Yorke, 2000) and most models of retention (Tinto, 1975, 1993) or student persistence (Choy, 2002), concern conventional adult or higher education. Attempts to understand retention in Open and distance learning have a long history (Woodley and Parlett, 1983). However the only model

of retention developed specifically for Open and distance learning (Kember et al, 1992) has been shown empirically not to fit the experience of Open University students (Woodley et al, 2001) and to have other weaknesses. Studies such as Shin and Kim (1999) have shown positive impacts of extra face-to-face contact on retention and at the Open University (UK) tutorial contact is associated with improved grades and retention, especially for students with weaker educational backgrounds (see Gibbs, 2003 for a summary of evidence). However it may not add much to our understanding to label such interventions as either 'social' or 'academic' integration, as Tinto and Kember do. Tinto's model, from which most other models are derived, is based on Durkheim's study of suicide, and seems particularly ill-suited to a context where social interaction and social involvement play such a small part. It was agreed fairly early on in the Symposium to abandon such models as the basis of insights into retention in ODL.

Empirical evidence from within the Open University about patterns of retention has focused on predicting retention from student characteristics, and on features of the organisational system that influence retention rates (cf http://intranet.open.ac.uk/pvcsg/student-retention/indexlist.htm). There has been less conceptual development of explanations of retention that could be used to inform pedagogy, curriculum design or interventions. At the same time evidence from practitioners' attempts to intervene to improve retention has tended to be small scale and context-dependent and it has not been easy to demonstrate positive impacts on retention or to provide empirical evidence to support practitioners' explanations (such as those of Roberts, 1984). Studies have focussed on isolated interventions rather than on the performance of complex systems.

In contrast there is a vast literature concerned with attempts to improve student performance and retention in the first year of conventional US higher education where access is also commonly relatively open. Reviews of the many long standing 'first year experience' initiatives are revealing important insights into what makes a difference to retention (cf Barefoot, 2002).

Insights from ODL contexts

Alan Woodley: Conceptualising student drop-out in higher education

Alan's paper reviewed the history of theoretical models of retention, emphasising the sociological roots in Durkheim of Tinto's model. Tinto's model has been adapted by Kember for ODL but the questionnaire based on this model (Kember's Distance Student Progress inventory) has been shown not to stand up to factor analysis, and the underlying constructs and the way they interrelate have been criticised by Woodley et al (2002). Kember sees students as having personal characteristics that enable them to become socially integrated, and then some of these students will become academically integrated, depending on a range of course characteristics. The sequential nature of this model differs from that of Tinto's, in which social and academic integration operate in parallel and longitudinally. There seems no convincing rationale for Kember's sequential model.

Alan Woodley highlighted the lack of definition of different kinds of 'drop-out' that make testing any conceptual model difficult, for example:

- at what point in the sequence of student enquiry, conditional registration, submission of an assignment and final registration is a student considered to be 'dropped in' in the first place?
- if students are studying courses in parallel and progressing on one but not on another, are they a drop-out or a success or both at once?
- whose definitions of success are being used? Institutional and funding requirements for better retention may not align with student preferences for periods of study and non-study over an extended period. Ormond Simpson pointed out that the record for the length of time to complete a degree at the OU UK currently stands at 23 years and that this was presumably perceived by the student concerned as a considerable achievement.
- if a student stops studying and returns, successfully, a few years later, whose problem is that, if anybody's?

In particular there was felt to be a lack of distinction between course completion and completion of a programme of study, in the literature, and that many ODL students have no ambition to complete a programme. Comparison of progress and success of conventional and distance learning students are difficult because much of the literature in conventional contexts concerns programmes while that in ODL concerns courses. Yorke (below) argued for evidence in conventional contexts based on completion of individual courses but many ODL institutions need more data about progression to subsequent courses, or through a programme of courses.

Alison Ashby: Monitoring student progress and retention in the Open University: definition, measurement, interpretation and action

Government funding for higher education institutions in the UK is linked to student completion of at least part of a course, with some funding being dependent on course completion (defined as 'sitting the exam'). This has had an impact both on institutional definitions of retention and on measurement of student progress.

Much of the research in the OU UK about retention has concerned the identification of student characteristics related to retention and the characteristics of courses with poorer than average retention. For example there are strong relationships between students' educational qualifications and their progress, and strong relationships between course characteristics such as workload and student progress. The reasons students give for dropping out are remarkably similar to those given by full time students at conventional institutions (see Yorke, below). There are also changing patterns of student recruitment and of student intentions, over time, and as a consequence there has been a decline in course completion and a decline in student progression from one course to the next.

The kind of data Alison reported, from management information systems and from student surveys of courses and about retention, has made it possible to draw up a plan of action to address retention issues. For example wrong course choice is commonly cited by students as a reason for drop-out and it is possible to improve course information and to provide 'samplers' that make it less likely that students will make inappropriate course decisions. It has also proved possible to identify courses with above average drop-out and to identify 'abnormal' course features associated with this drop-out (such as course difficulty, workload, and quality of tuition) for attention and action. Management information systems have also been used to identify students 'at risk', and those times in the year when there is a surge in

drop-out. The use of this information is one of the foci of the paper by Ormond Simpson about student support interventions (see below). One of the lessons from the US (see Betsy Barefoot, below) has been the importance of good monitoring systems so that it is possible to keep track of students and to relate progress to other variables. The strategy at the OU UK also includes supporting course teams to research in more detail the reasons underlying poorer than average retention on their course, and to monitor the impact of any changes they make.

Alison Ashby also emphasised the increasing role played in policy and funding decisions by the employer dimension, where students' employers may be paying their fees or may have goals for learning outcomes that differ from those of either the student or the University.

Ormond Simpson: The impact on retention of interventions to support distance learning students.

A good deal of the support offered to students in ODL systems relies on students identifying themselves as in need of support and on the students then actively seeking support. However sophisticated and extensive the student support system, it is fundamentally reactive in nature. It seems clear that students who take advantage of such support are different in nature from those that do not, and they may also be already more strategic, more competent and more able to tackle study problems, than those who do not. Self-referral may only involve a small proportion of students and may leave untouched those in most need. Using the management information data reported by Alison Ashby to identify 'at risk' students, and crucial points during the study cycle where intervention may be able to have an impact, Ormond Simpson reported evidence about proactive interventions where the initiative is taken by the institution rather than by the student. Striking features of his report included:

- The notion that there may be a baseline level of drop-out which it is impossible to do anything about (because triggers to drop-out are beyond the control of the institution, such as illness) and that there is therefore a maximum possible increase in retention. While the impact of specific interventions may appear small (e.g. 2%), they may nevertheless represent quite a large proportion of the maximum possible impact.
- Data showing the extent to which there is much more scope for improved retention at some points in the study year than others: for example once a student has not submitted the first assignment on a course there is already relatively little you can in the rest of the course do to improve retention.
- Cost-effectiveness of proactive interventions. Simple calculations were undertaken demonstrating that, on the basis of evidence of improved retention from the evaluation of controlled studies, income could be earned from increased student retention, and costs reduced by not needing to recruit and register new students to replace those who had been lost, that greatly exceeded the costs of intervention per student. By using mathematical models of student progress it was shown to be possible to target interventions on those most likely to benefit so as to increase cost-effectiveness still further by reducing interventions for those that do not need support. Such calculations are currently being used to inform policy and funding decisions about the future shape of student support at the OU UK.

Ormond Simpson also raised issues concerning the organisation of such information-based support systems. For many interventions it may be possible to undertake them centrally, at a distance, from a 'call-centre' type system, driven by 'customer relations management'

software that links information about students' characteristics and their ongoing progress (or lack of it) to records of past contacts, whoever undertook the contact. On the other hand students' own tutors might make more sensitive and appropriate use of management information and students might respond more positively to interventions from someone they know. There is considerable debate within the OU UK at present about the extent to which support is best managed through students' own (local) tutors or through impersonal (but possibly better informed and targeted) systems that could be centralised, or even offshore!

Insights from conventional contexts

Mantz Yorke: Why students leave early in higher education

Mantz Yorke is responsible for the largest scale study of student retention in conventional higher education in the UK (Yorke, 1999). Both Yorke's study and a more recent study by Davies and Elias (2003) found that the most common reason for drop-out was wrong course choice, with financial problems not far behind. Yorke also identified poor quality of student experience as a major issue. Recent ODL studies by John Richardson have identified quality of course experience as the major variable linked to student performance and this experience is mediated by students' experience of their tutor. Yorke found that part time students also cited workload and financial difficulties (as did the adult students described by McGivney, see below). The similarities of Yorke's findings to ODL findings such as those cited by Alison Ashby, are striking. An exception concerns the correlation between student age and retention: negative in conventional contexts (although there are exceptions, such as at Oxford Brookes University) but positive in ODL.

Yorke identified six institutions with retention better than would be predicted from their student intake and a study of the institutions (Thomas and Yorke, 2003) identified the following key institutional characteristics:

- an institutional climate supportive of student development, that was perceived as 'friendly'
- an emphasis on support leading up to, and within, the first year of study
- an emphasis on formative assessment, rather than summative testing, during the early phase of study
- a recognition of the social dimension of learning activities.

Yorke was critical of the relevance of Tinto's model, particularly for older students for whom factors extraneous to the institution were dominant and for whom the emphasis in Tinto's model on social interaction, outside of courses, was largely irrelevant.

Veronica McGivney: Understanding 'persistence' in adult learning

Veronica McGivney works in the context of adult and part time education, rather than in ODL, but many of the students she studies are similar to those in ODL (and different from those often studied in the context of research into retention in conventional higher education) in that:

- they are likely to have a range of external constraints involving finances, their work and domestic commitments;
- they are likely to be living at home with a social world based at home and in work

- their learning experience and qualifications may be out of date
- they may lack confidence in their ability to learn, especially if there has been a gap since the last engagement with formal learning in educational settings.

The reasons for adult learners not completing were described as heavily dominated by personal and 'life related' factors. What is more when such students were temporarily interrupted by unforeseen circumstances, even for a short period, they often decided that it was not worth trying to continue. Male adult students are more likely to cite work and finance related issues for dropping out while female adult students are more likely to cite family commitments and childcare difficulties. The role of family and partner support was strongly emphasised and there were reports from symposium participants of small scale efforts to engage ODL students' family and friends in supporting their learning.

Correct course choice was again reported as fundamental to course completion and progression, and information about the guidance available was also important. Interestingly Higher Education was reported to be perceived as less supportive than Further Education and students sometimes found the extent of independence required (sometimes a euphemism for lack of support) came as a shock.

Finally, Veronica McGivney's list of steps institutions can take to support adult students so as to improve retention bore a striking resemblance to that reported by both Mantz Yorke and Betty Barefoot.

Betsy Barefoot: Higher Education's revolving door: confronting the problem of student dropout in US Colleges and Universities

Betsy Barefoot is the Co-Director of the Policy Centre on the First Year in College at Brevard College, North Carolina. Access to much of US higher education has been substantially 'open' for a considerable period of time and retention in the first year of College can be lower than in some ODL contexts: typically below 50% completion of studies within five years, and in Two-Year Colleges below 50% progressing to the second year. The Policy Centre has collated evidence from 25 years of research into attempts to improve retention, and advises institutions and policy formers. Overall national progress has been limited as the problem accelerates about as fast as practice improves. There are, however, examples of improvements in some Colleges and in some courses and it is the insights from these contexts that are most useful to share. There is now strong evidence of positive impact on retention of:

- 'first year seminars' in parallel with taught courses, concerning how to study. Dennis Bancroft of CNED (France) reported the use, in Eire, of short, cheap, introductory ODL courses that were primarily study skills courses. What drop-out took place then happened within these short courses rather than in the longer more expensive ODL courses students went on to study.
- 'learning communities' that keep coherent groups of students together over several courses and build mutual support mechanisms.
- orientation programmes, and the use of Supplemental Instruction' (SI) run by senior students.

Much of the research in the US has been about individual differences and identifying the characteristics of students who drop-out. Interestingly institutions' attrition rates are even across all levels of academic performance and even the best students can leave through

boredom, lack of challenge, failure to connect with the campus social systems and financial pressures. The Symposium was told that "...contemporary American College students are not known for their product loyalty" and of the 53% who drop-out, more than half simply transfer their studying to another institution.

It was reported that many of the things that are known to worsen retention are very straightforward to address, but that few bother to take action. For example timely feedback on progress improves retention but fewer than 50% of instructors were reported to provide such feedback.

Symposium outcomes

Working groups during the Symposium presented their work and then afterwards wrote this up for the web site. This section selects key points from these reports. The first four topics address the categories of 'persistence barriers' outlined by Morgan and Tam (1999) but the other topics address areas less commonly tackled in the literature.

1. The role of the institution in improving retention. Peter Regan

   Just as Betsy Barefoot's work on the 'First year Experience' has emphasised the importance of good information systems to track student progress, Peter Regan emphasised the importance of information systems and their use in ODL. In the North East Region of the OU UK Peter Regan uses a data base connected to a management information system to identify students at risk (using a mathematical model based on student characteristics and past student retention behaviour) and students who withdraw needlessly (whose grades mean they could still pass a course even though they have missed or failed some assignments). This information prompts pro-active interventions that have then been demonstrated to improve retention compared with control groups (for a summary see Gibbs 2003).

2. The role of course designers in improving retention. Richard Freeman

   Richard Freeman identified 'problem behaviours' of course designers (such as using technology where no proven benefits have been identified) and also design features that are likely to improve retention (such the timing and nature of the first assignment). For example a large enrolment level 1 Science course at the OU UK experienced a marked improvement in the proportion of students who submitted their first summative assignment, when the course included an earlier, easier, formative-only assignment. Once students have submitted their first assignment they are much more likely to complete their course.

3. The role of the tutor in improving retention. Jo Tait

   There is a range of evidence of the positive role tutors can play in improving retention (some of which were reported in Ormond Simpson's paper). Mantz Yorke outlined as essential features of a traditional face-to-face system that included a 'personal face' that was welcoming and that appreciated and responded to individual student differences and needs from the first point of contact. It was felt that much the same issues applied to distance education and that tutors had a key role in engaging students in a learning

community and building:

- a sense of participation
- personal self esteem or 'self-efficacy'
- a sense of loyalty.

4. The role of the student in improving retention. Roger Lewis

   In the US the greatest influence on the retention of College students is other students. For many distance learning students the influence comes from family and friends, then the tutor and only then from other students. In the OU UK only a quarter of students admit to contacting other students. This may be a consequence of the relative lack of use of peer learning, peer tutoring and peer assessment in distance learning compared with many face-to-face contexts. It may also be a consequence of unsophisticated students' conceptions of the role of the tutor, based on previous educational experience.

   A continuum of formality of peer support systems was identified, ranging from formal methods such as Supplemental Instruction, with its proven impact, to informal support involving 'buddy' systems and mentoring. In US Colleges mentoring can involve payment, training and academic credit, as well as prestige, and is much more developed than in either face-to-face or distance education in the UK. In the US there is also a growing movement involving group learning that includes group assessment, and hence interdependence of students.

5. Improving retention at the programme level. Mantz Yorke

   Almost all the focus on student retention in ODL has focussed on individual courses rather than on programmes. In conventional contexts retention on programmes can be much higher than retention on individual component courses, and students may identify themselves more with the programme than with any specific course. In the OU UK there is significant drop-out 'between' courses when there are no curriculum or tutor issues involved. Mechanisms to improve retention on programmes were identified and included:

   - developing a sense of belonging;
   - having good 'customer relations' outside of courses;
   - providing coherent, well-structured learning experiences (rather than fragmented, start-stop experiences);
   - offering substantial discounts or other incentives for registering on and completing programmes;
   - having a consistent approaches to learning across courses.

Consideration of programme issues highlighted the distinction between retention (within courses), retrieval (after failure of a course) and reclamation (after a period of non-engagement.

6. What additional scope do you have to improve retention in ODL if it isn't open? Peter Knight

One of the main reasons that ODL usually has less good retention than conventional HE is that it is open. The flexibility itself causes many of the problems. Reducing openness may benefit some students and a number of issues were discussed concerning problems caused by flexibility and potential benefits of reduced flexibility, including:

- there are benefits of cohorts of students starting to study a course at the same time and progressing at the same pace, particularly in terms of developing a learning community and affording scope for peer support (see 4 above). There is also evidence that small cohorts of students taking the same sequence of courses together, as a cohort, improves retention. In this case students would voluntarily give up some of their freedom of choice and trade it off against the increased support of a coherent cohort. About 60% of US Colleges now offer 'learning community' programmes, typically enrolling 25 students together on a related cluster of courses, as a study community, to improve retention;
- there is overwhelming evidence that some students have a much lower likelihood of completing a course than others. Ormond Simpson had rank ordered students in the Cambridge Region of the OU UK using a mathematical predictive model based on past student performance, and the student at the bottom of the list had a 9% chance of completing a course. A point comes where openness of access does the student no favours. In the OU UK students are free to enrol on courses that they are totally unprepared for (though they are advised against it but often ignore the advice). Some simple rules (e.g. not being allowed to enrol on a level 2 course until a level 1 course has been completed) would have quite a marked impact on retention;
- allowing students to enrol on individual courses, rather than on programmes, can both allow students to enrol on inappropriate courses for which they are inadequately prepared and also afford much less scope for the development of individuals over extended periods of time, including the development of their study skills and ability to cope with ODL. Enrolling on individual courses also makes it much less likely that students will experience coherent curricula and planned progression – issues identified in 2 above;
- continuity of pastoral care is difficult to arrange, the more open the system. In the UK OU for example students are now unlikely to receive support between courses as their tutor's role finishes immediately before the exam and does not start for another three months with the next course start. A considerable proportion of students are 'lost' during this period and do not re-register for another course.

The University of Phoenix has impressive retention figures (e.g. 65% degree completion) party through operating a system that is open in very few respects, and students are prepared to pay premium rates for the privilege. Openness in many ODL contexts may simply achieve better recruitment at the expense of retention. Ormond Simpson proposed modelling the relative impacts of less openness on recruitment and retention.

7. A timeline of opportunities for interventions to improve retention. Tony Cook

The report of this group offered the clearest practical benefit to designers of ODL systems. It identifies a series of points in students' contact with the institution where there is scope to improve retention, accompanied by notes about the specific intervention appropriate at that time. There is research evidence about the impact of some of these interventions. For example a tutor contacting their students three weeks before their first

assignment, just for a chat about progress and encouragement, improves students' submission rates, grades and course grades. The time points identified were:

- First impression
- Period of negotiating 'fit' between student and institution and course (as inappropriate course choice is one of the most common reasons for drop-out)
- Registration
- Course start, and a sequence of course-related issues, especially early and regular testing for monitoring and feedback. Proactive intervention studies at the OU UK have identified positive impact of mid course contacts for 'inappropriate withdrawals' and of late contact before exams. It also makes a difference to students' likelihood of course completion for those who have missed an exam if they are contacted within 24 hours about arranging an exam re-sit. The OU UK is moving towards a comprehensive proactive intervention system that ensures that targeted students are proactively contacted in timely and relevant ways at all key points
- Intention to re-register.
- End of course

8. Planning research into why students leave very early in ODL. Graham Gibbs

The greatest component of drop-out in many ODL systems (in the OU UK about 20% of all enrolments) happens before students have even engaged in their course: they register and then don't really start. At the OU UK students can obtain a refund provided that they drop-out early enough, which explains some of what is going on. But little is known about why some students do not even get going. Retrospective studies of students' post hoc justifications for having dropped out are not particularly convincing, and seldom succeed in obtaining data from very early drop-outs. Later drop-outs cite reasons such as workload which are unlikely to be as relevant to those who don't even start.

i) Technical issues concerned with a study of very early drop-out include:

- identifying who the students are;
- very low questionnaire return rates (typically below 25%, even for surveys of students who engaged before they dropped out);
- the way diary or journal studies might change students' perceptions and decisions;
- the difficulty of trusting and interpreting students' expressed rationales for their drop-out decisions. Students tend to blame others rather than themselves (e.g. blaming over-difficult, over long, course materials rather than themselves for not being sufficiently committed, or for not following advice that the course was too advanced given their educational background and lack of experience with ODL).

ii) Theoretical reconceptualisation or retention in ODL:

There was a considerable degree of consensus that the theories of retention that trace their way back to Durkheim's work on suicide (including both Tinto and Kember) were inappropriate for ODL. It was argued that 'non-progression' should be seen as a normal part of every day life rather than as a stressful life-changing event, and that the 'leaving of a cultural and social group' dimension of drop-out, emphasised by terms such as 'academic and social integration' is not nearly as prominent in ODL. The symposium therefore searched for alternative theoretical perspectives that were perceived to be more relevant. A number of

areas were discussed, including debates about risk and risk-taking behaviour, the role of institutional communication, and the significance of 'role strain'. Two specific theoretical frameworks, derived from marketing, are elaborated here, partly because they come at the issue from a commercial perspective. If drop-out is not after all such a huge issue for ODL students, it certainly is for ODL institutions, whose financial futures depend on doing something more effective about it. These theories treat education as a service and treat students as customers. The following paragraphs have been provided by Nicky Bolleurs, who worked in a group within the Symposium on alternative theoretical models.

Marketing theories that help understand student persistence

Service quality

Service quality affects not only customer satisfaction, but also the reputation of the brand, and there is a wide body of research that identifies both brand reputation and customer satisfaction as important determinants of customer loyalty. In the service marketing literature the ability to manage customer expectations and the resulting implications on service quality are seen as crucial to customer loyalty. These marketing ideas are particularly relevant to higher education where failing to meet student expectations of their educational experience is seen as key to student attrition.

Parasuraman, Zeithaml and Berry's research defines service quality as a function of customer expectations. They take the view that service is deemed to be of high quality when customer's expectations are confirmed by subsequent service delivery. They postulate that, as services are less tangible than goods, the dimensions on which customers form expectations may also be different. Initial qualitative research has led to the identification of five dimensions (tangibles, reliability, responsiveness, assurance and empathy) on which customers evaluate service quality.

If expectations are not met on any of these dimensions, satisfaction gaps result, and the customer is likely to record a poor rating of the quality of service provided. Over the years, this group has developed their initial qualitative studies into the more comprehensive statistical tool known as SERVQUAL, which is now widely used to measure service quality throughout the services sector, including education.

Relationship Marketing and Customer loyalty

Another key concept in creating customer loyalty is the ability of organisations to form relationships with their customers. Relationship marketing focuses on getting and keeping customers and is concerned with customer loyalty because of the long term benefits of retaining customers. The activities involved in it are aimed at developing long-term, cost efficient links between an organisation and its customers. These relationship building techniques involve, treating customers fairly, enhancing core services by adding extra value and providing a highly customised service.

These ideas have emerged in one piece of research into student retention. Stephen Bruning investigated whether student-university relationship attitudes and satisfaction evaluations distinguished those who returned to university from those who didn't. He used a series of PR activities aimed at building university/student relationships throughout the academic year and reported that the results from this investigation,

demonstrate that student-university relationship attitudes influence student retention, and suggested that retention strategies should include elements designed to build relationships.

Customer retention has a direct impact on profitability; past research has claimed that is can cost five times as much money to create a new customer than to keep an old one. In addition there is research also showing a correlation between customer loyalty and customer spending. Loyal customers spend more than new customers. These ideas are particularly relevant to the business school, because we need not only to retain students on the courses they enrol for – but encourage them to progress through their chosen pathway to higher qualifications; unfortunately this area of retention is only mentioned in passing in the literature and needs further research. Of course it would be unrealistic to assume that all certificate and diploma students will progress on to our MBA programme. And we still need to concentrate our efforts on reducing traditional student attrition, but student loyalty issues should be a core focus of the business school's attention.

Full text papers from the six presenters, and an editorial providing a linking overview, will be published in a special issue of the journal Open Learning in 2004.

References

BAREFOOT, B. (2002) Second national survey of first year academic practices. www.brevard.edu/fyc/survey2002/findings.htm

CHOY, S. (2002) *Access and persistence: findings from 10 years of longitudinal research on students*. Washington, DC: American Council on Education.

DAVIES, R. & ELIAS, P. (2003) Dropping out: a study of early leavers from higher education. (London: Department for Education and Skills).

GIBBS, G. (2003) *Evaluation evidence about regional efforts to improve retention, and implications for a common regional system to improve retention.* Student Support Research Group, Report 76/2003, (Open University: Milton Keynes).

GIBBS, G. (2003) The *cost-effectiveness of tuition patterns: issues from the literature.* Student Support Research Group, Report 60/2003, Open University: Milton Keynes.

KEMBER, D., LAI, T., MURPHY, D., SIAW, I. & YUEN, K.S. (1992) Student progress in distance education: identification of explanatory constructs. *British Journal of Educational psychology*, 62, pp285-298.

MCGIVNEY, V. (1996) *Staying or leaving the course.* (Leicester: NIACE).

MORGAN, C.K. & TAM, M. (1999) Unravelling the complexities of distance education student attrition. *Distance Education*, 20,1, pp96-108.

ROBERTS, D. (1984) Ways and means of reducing early student drop-out rates. *Distance Education*, 5, 1, pp50-71.

SHIN, N. & KIM, J. (1999) An exploration of learner progress and drop-out in Korea National University. *Distance Education*, 20,

THOMAS, L. & YORKE, M. (2003) Improving retention of students from lower socio-economic groups. *Journal of Higher Education Policy and Management.*

TINTO, V. (1993) *Leaving College: rethinking the causes and cures of student attrition.* (2nd Edn.) Chicago: University of Chicago press.

WOODLEY, A. & PARLETT, M. (1983) Student drop-out. *Teaching at a Distance*, 24, pp2-23.

YORKE, M. (1999) *Leaving early: undergraduate non-completion in higher education.* (London: Falmer).

AL World – A new way of delivering support for UK Open University tutors

Kathleen Gilmartin
The Open University, UK

Why AL World

Recently many UK Open University (OU UK) Course Teams have moved to delivering part or occasionally all of the course materials and tuition electronically. Modes of delivery include web (internet and extranet), synchronous and asynchronous conferencing and the use of electronic Tutor Marked Assignments (eTMAs). While accessing these materials is optional for students on many courses, the number requiring the Associate Lecturers (ALs) and students to work online is increasing. Consequently, the demand for web-based information, resources and facilities has grown significantly, leading to the development of a variety of online materials for both students and ALs. The OU UK is committed to ensuring that all students have the opportunity to use Information and Communication Technology (ICT) in their studies by 2005. Although initially this will not be compulsory it will affect the support that students receive during their studies. ALs (or tutors as they will be referred to in this paper) provide the tutorial support for students, they also mark assignments and offer advice and guidance in relation to the course materials. Tutors work part-time and at a distance for the OU UK with many also working for other higher education or further education providers. To facilitate this move by the OU UK to make greater use of online provision, the decision was taken to require all tutors to use ICT from 2004 when appropriate for:

- Teaching and supporting students
- Accessing information to undertake duties in relation to students
- Facilitating contact with academic units
- Dealing with administrative contact with the University.

Three types of course can be distinguished in terms of their use of ICT:

- Web intensive – all teaching materials and student support delivered online
- Web focused – use of online ICT as a required element of teaching support
- Web enhanced – all courses not included in a or b. Students can opt to use the online services and applications provided by the University. For tutors this could generate student and University email traffic and administrative activities and communication.

Tutors currently vary in their use of ICT from those who never use it, to those who rarely communicate with their students in any other way. Tutors working on web intensive or web focused courses have become increasingly frustrated by the lack of online resources to support them in their role. This demand was recognised in 2001 and led to the development of the AL Portal that offered tutors information about their student group, as well as access to web facilities linked to their course. While this basic website met an initial need, it quickly became clear that further development would be necessary. Changes to tutors' terms and conditions further highlighted the need for a website that could offer all the resources and

facilities that tutors need to support students and allow them to carry out their role effectively. The AL World project was set up and hosted by Student Services in October 2001.

The Vision

The vision for AL World is to provide from a single electronic access point all the resources and facilities that tutors need to help them support their students, while also providing scope to be part of the wider OU UK community.

To achieve this vision, AL World must be useful, easy to use and focused on the needs of tutors. It is essential that there is strong tutor involvement in the planning, testing and development of all aspects of the site. AL World must be clear on the essential or core elements of the AL role, what is optional or developmental, and the system should recognise and support the differences between new tutors and those who are more experienced. It is also essential that AL World is up to date and that tutors are clear about the status of the information that they can access.

Through AL World, tutors will be able to share information and resources with each other engendering a sense of community. They should also be able to communicate easily with different parts of the OU UK. AL World will offer the opportunity to deliver staff development to all tutors not just those who can attend face-to-face sessions.

Eventually AL World should provide a single entry point for tutors to all electronic resources and facilities needed from whatever sources. The website will also cover the entire range of activities related to tutor work, such as residential school tutoring, script marking and course team consultancies. This means that AL World must appear coherent and well integrated to the tutors using it. This is a challenging aim given the number of different 'owners' of the content of the material accessible via the website. The OU UK is considering developing a Virtual Learning Environment (VLE)/Managed Learning Environment (MLE) for students and this will have longer-term implications for the delivery of material and resources within AL World.

TutorHome

Prior to the start of the project in January 2002, a comprehensive scoping exercise was carried out. This both established the vision and aims for the project and identified the concerns that tutors have about working and communicating electronically. Further consultation with tutors early in the project allowed the team to establish a possible structure for the site that was tested prior to being built by the end of 2002. Initially dubbed AL World, it was clear that the new site would be accessed by a variety of part-time staff and this led to the new Home Page being called TutorHome. TutorHome, www.open.ac.uk/tutorhome is password protected and is currently available to all tutors with 'live' contracts. The information and resources offered by TutorHome are currently limited, although tutors now have access to more links than before. A number of developments will shortly come online and a comprehensive evaluation of the site is planned for October 2003.

The OU UK has around 8 000 tutors, less than half of whom currently use the existing portal. It was considered that to launch the new site without checking how a wider group of tutors felt about it would be unwise. The site was released at the end of February 2003 and a message placed on the AL Portal inviting tutors to visit the new site. A significant number of

tutors took the time to offer feedback on the Home Page and encouragingly most indicated that they liked what they saw and offered ideas for developments. In April 2003, all tutors were sent a leaflet describing the new site. This signalled the launch of the new site and coincided with the withdrawal of the AL Portal on 1 May. This new phase of the development offers the opportunity to trial facilities and resources before all tutors are required to receive information via this medium in 2004.

Delivering Information and Resources

Tutors currently complain that they receive too much paper from the OU UK. Tutors and students are allocated to one of thirteen different Regional Centres across the UK. Tutors are directly supported in their role by their Course Team and their Regional Centre. Regular mailings come from one of three sources: Course Teams (directly or from the warehouse), Regions and central Student Services. However, a tutor might occasionally receive one-off mailings from Marketing or other parts of the University. Unsurprisingly they can feel overwhelmed by the information received and often put it to one side. Tutors usually receive information and resources relating to a variety of topics in one mailing and it is possible that few of the items are of interest or direct relevance to the tutor. It is acknowledged that this method of delivery is problematic.

The University currently uses FirstClass, an email and conferencing system, to deliver much of the support associated with online courses. The majority of tutors (and students) use the FirstClass client that requires going online but also permits working offline. The web access version of FirstClass is much slower and lacks the functionality of the client-based version. Many of the web intensive or web focused courses use the online conferencing system to disseminate course specific information and resources to tutors. However, tutors find it is hard to identify these, often vital, messages as they can get lost among the traffic. This can be exacerbated by the poor use of subject lines. Following these message threads can be very confusing and leads to information being overlooked. Tutors can find the number of conferences associated with each course confusing and those working on more than one course find that there is no consistent naming convention across the University. While this method of delivering information and resources is more immediate it also has its problems.

Clearly neither of these delivery methods offers an intuitive way to manage the dissemination of the information and resources required for tutors to carry out their roles. At this stage in the development of web resources and facilities, it is important to resist the temptation to simply make all the paper materials available to tutors online. This would do nothing to help tutors make sense of the raft of material they receive from the University and would be seen as passing on printing costs to tutors. It was immediately clear that TutorHome would need to be structured so as to manage the wide range of links and facilities that tutors need to access. Consultation with tutors identified six areas: students, courses and faculties, regions, teaching and learning, university and personal details. These mirror the tutors' view of the OU UK and the way they interact with it. Most links, resources and facilities naturally fall into one of these categories but a few could be assigned to more than one. Recognising that tutors have different views of the University, some resources are available from more than one sub section.

Making it work for tutors

Those responsible for delivering information and resources to tutors must now consider how to make effective use of electronic communication. In the first instance, it is important to consider which tutors might need to receive this information and whether it is relevant to them all or just a particular group. Online delivery also removes the need to ensure that an item goes in a particular mailing irrespective of whether the timing of that mailing is appropriate or not. Tutors will receive an email telling them that information or resources are available from TutorHome and give the appropriate hotlink. Consideration must also be given to how a tutor might use the resources or information on offer to them. Tutors are no longer required to be a source of information regarding University regulations nor are they expected to be able to offer detailed course choice advice to students. Much of this type of information is available electronically to students, and tutors should be aware of where to direct students. Tutors must be encouraged to view the University's web sites as an up-to-date source of information, thus they only need to receive information about changes that might affect what they do or might have to say to a student. With time the amount of information that tutors need to receive is likely to reduce, as they should become more confident about finding the answers they need via the website. It is vital that tutors move from feeling that they need to retain information about relevant rules and regulations either in their head or on paper, as experience shows that this can lead to them inadvertently misinforming students. In future, tutors should always check what the current position is via TutorHome.

However, one barrier to this is the fact that most tutors cannot go online to check information while they are talking to their students on the telephone. Mobile phone use is not widespread among tutors and many object to calling students on their mobile phones, so this cannot currently be considered a solution. Many tutors feel that they must have the appropriate information at their fingertips and for most this means paper format. If students move to contacting their tutor by email this will make it easier for the tutor to prepare a response and choose how they reply to the student. Evidence suggests that complex queries, particularly those requiring a decision on the part of the student, are easier to manage by talking directly to the student whereas requests for information can usually be dealt with effectively via email. Resources that allow tutors to cut-and-paste a response into an email and template letters that they can easily adapt to suit their needs will form part of the AL World development and should help cut down the amount of time spent by the tutor responding to student queries.

Many tutors have expressed a concern that they will not know what is new when they enter TutorHome. Information available from the site generally falls into one of two categories, it is either essentially factual, or it offers guidance or advice. Most tutors would not expect to remember dates, details about the students in their group etc. Such information is currently provided on paper but tutors cannot be sure that it is still up-to-date when they receive it or look at it at a later date. TutorHome will offer immediate access to this kind of information and tutors should not expect to receive messages alerting them to many of these changes. The exception to this will be changes to their student details. Tutors will receive emails alerting them to certain of these but they will also be highlighted on the website for a limited time. Highlighting changes to information will be carefully monitored for effectiveness and its use elsewhere in the site explored.

A system for sending emails to tutors is currently being developed and it will be possible to select different groups of tutors to be selected each time. This will allow messages alerting tutors to changes, updates and new resources to be sent without the need to set up mailing lists and many messages will be generated automatically by the OU UK's database systems. The facility to send messages to a bulletin board will be available early in 2004 and tutors will also be allowed to 'switch off' emails if they find they prefer to receive messages via their bulletin board. Tutors will receive messages alerting them to changes that might affect what they say to students or procedures they are required to follow. Highlighting urgent messages should be possible but relies on those sending messages to have a clear definition of 'urgency'.

These developments imply that tutors will have to change their working practices in the coming months. Even those familiar with the web and conferencing will receive more information and resources from the University electronically than they have before. Staff development sessions may need to address issues raised by this with tutors but many will rely on help and guidance delivered via TutorHome. Materials are already being developed to help tutors use the site effectively and they will also receive training materials to allow them to work with the file that contains details of their student group. A mechanism must be found to allow tutors to share what works for them and to enable them to gain confidence in the information and resources provided via TutorHome. Many will feel compelled to print off everything they get initially but they should gradually become confident that this is unnecessary. It is vital that those responsible for delivering information and resources explore ways to present the material so that either tutors feel they don't need to print it off or do so selectively if they so choose. Ensuring that tutors only need to print off what is pertinent to them is as crucial as ensuring that the information they receive is appropriate to them and their situation. Tutors should no longer need to wade through the information and resources they receive trying to sort out what if anything relates to them. This feature of the medium could prove to be one of the positive aspects for tutors of moving to this type of delivery.

Evaluation

Tutors accessing TutorHome have the opportunity to fill in a structured feedback form or they can send a message to the TutorHome mailbox. Users who submit a message or a form receive a reply within a few days. These not only acknowledge receipt but also indicate what progress if any is being made regarding the issue or facility they have identified. The points raised are gathered together in a change request file that is regularly monitored.

A comprehensive evaluation of the site will be carried out in autumn 2003. This first survey will be paper based and will be sent to a random selection of tutors. The aim of this initial evaluation is to establish whether the site meets the needs of tutors and to give an indication of what further developments might be useful. Given that tutors are not required to work online until 2004 it is possible that some of those receiving a questionnaire will not have logged onto TutorHome. It will be important to find out why and whether there is a particular reason beyond not being required to do so. A number of responses will be followed up to gather further qualitative and quantitative evidence. The evaluation will be written up and presented as a paper accessible to all staff including tutors. Clearly the TutorHome website must meet the needs of the majority of tutors if they are to use it with confidence but it is also important that those using the site to deliver information and resources to tutors are convinced about the site's effectiveness. The ongoing success of the site will rely on all relevant OU UK staff using it and supporting its further development.

2004 and beyond

8000 tutors cannot possibly share the same view of the University, have the same needs or work in the same way. It is already clear that the current site is a compromise and that as tutors gain confidence in using web-based resources they will want to re-organise the site to suit their priorities and ways of working. Customisation will be possible and will be explored during 2004. In addition to having a choice about how they receive messages, tutors will also be offered the opportunity to change links available from the home page and to alter how their student information is presented. Lack of web experience currently inhibits many tutors who find it difficult to imagine how they might want to work once information and resources are available online. This is likely to change quite quickly during 2004 as they get used to working in this way, and the development of a VLE for students will impact both on the way that TutorHome evolves and how tutors support their students. 2005 may well see a more demanding, web competent cohort of tutors and this will offer a new challenge to all those responsible for supporting tutors not just the AL World team.

Although it looks unlikely that telecommunications technology will improve sufficiently in the next couple of years to ensure that tutors can access the web quickly, cheaply and reliably, hopefully they will all move to using a package that allows them to use the web without worrying unduly about the cost. The cost of mobile phone calls may reduce sufficiently to allow tutors to use one to receive student calls and/or the cost a second line will not be off-putting. Broadband, although not currently available across the whole of the UK, will also free up the telephone. This would then facilitate the use of TutorHome while on the phone to a student provided, of course, that another member of their household is not the using the computer!

Current delivery of information and resources to tutors is not perceived as efficient. Tutors often feel unnecessarily distanced from the OU UK and can find that they are not able to support their students appropriately. TutorHome offers the opportunity to address these concerns so it is important that each development is carefully evaluated. The feedback gained from this work will inform the debate about how to deliver information and resources effectively via this medium. Further work is also needed to establish how staff development might be delivered effectively online. It is clear that AL World and the development of TutorHome will offer a new way of delivering support for OU UK tutors.

Widening access in Higher Education in the United Kingdom: an alternative model.

Charles Juwah and Brent Muirhead
The University of Phoenix, US

Introduction

Higher education is critical in underpinning the socio-economic growth and development of the future wealth of any nation. The ability of nation states to survive and thrive in a global and highly competitive knowledge economy is largely dependent on the development of its human capacity through high quality education and training.

1n 1997, the National Committee of Inquiry into Higher Education emphasised extending opportunities for higher education to include the disadvantaged sections of the society. In response to the recommendations of the report on Widening Access, the Secretary of State for Education and Employment, David Blunkett, stated that access to higher education (HE) must be widened to include those who have been traditionally under-represented in our colleges and universities, thereby enhancing social inclusion. Delivering a landmark speech on Widening Access, on February 2000, he further stated:

> In sum, higher education in this century will need to look very different to the system that evolved in the second half of the 20th century. It will typically be mixed mode – delivering through Information and Communications Technology (ICT) and other learning at a distance, as well as face-to-face. It will offer flexible provision tailored to need, overcoming traditional distinctions between full- and part-time study, and responding rapidly to changing social and economic conditions. Its students, drawn from all backgrounds, will reflect the society of which it is a part, and they will undertake learning at home or in the workplace, as well as on the campus. Learning programmes will be more diverse and will be offered within a flexible credit and qualifications framework that embraces intensive short courses and recurrent lifetime participation.

The UK government's policy and target for widening access to HE is to achieve a 50% participation rate for individuals aged 18 to 30-years in HE by 2010 in England, Wales and Northern Ireland. The figure is currently 41.5% (Polly Curtis, 2002, Guardian Newspaper, Friday May 31). Available figures from the University and College Admission System for 2001 showed that applications to universities from the target group of 21 – 30 year olds rose by only 0.1%. At this rate, the government target will not be reached until 2015, five years past the target date. Scotland, it has to be noted already has well over 50% participation rate in HE for the age group of 18 to 30-year olds.

To date, several initiatives have been introduced to help widen access and social inclusion in higher education. These include:

- Wider Participation Strategy for Higher Education Institutions (HEIs), for example, Wider access initiatives/programmes (a fast track route for mature students and adult returners to education to be matriculated for degree courses); introduction of foundation degrees, 2 x 2 programme of two years in Further Education and HE respectively, etc.;
- The University for Industry (Ufi) – LearnDirect initiative launched in 2000. This initiative is geared towards catering for the needs of employees of small medium sized enterprises and deprived communities;
- The creation of a Learning & Skills Council, which will be responsible for the funding for the planning and development of skills of all post-16 learning (except higher education);
- Special Educational Needs and Disability Act (2001) – this act promotes participation of individuals with disability via requiring training providers to make reasonable adjustments to accommodate the needs of the disabled individual.

The introduction and implementation of wider participation strategies by HEIs, although relatively successful, is impacted upon by resource implications – lack of space, inadequate teaching and laboratory facilities, poor libraries and inadequate numbers of teaching/lecturing staff. In the recent past, academe and the National Union of Students have strongly protested against the government's Widening Access Policy and achievement of the 50% participation rate. These protests have been against the background of under-funding by successive governments and the lack of adequate resources for HEIs, which inevitably negatively impact on the standard and quality of teaching and learning. The introduction of fees also resulted in a drop in numbers of students' application to universities in England and Wales (Polly Curtis [2002] Guardian Newspaper, 31 May).

Figures available to date suggest that about 400,000 students (a 37% increase over the period 1999/2000 to 2009/2010) and additional 17,000 lecturers are required if the government's 50% higher education participation target by 2010 is to be met. On an annual basis, this is a 3.7% or as the Universities UK reckons, 30,000 students need be recruited next year to meet the government's target (Thompson, 2003 –THES of 20 January, p.6).

The recent UK Government white paper on The Future of Higher Education (2003) promises extra £10 billion resources to help reform HE via increasing access, improving skills development and excellence in teaching and research.

This paper aims to promote a dialogue/debate to address the following:

- Are the traditional HEI structures adequate in delivering wider access and participation in education for all? Have hybrid and innovative forms of access and delivering education, for example, boundary-less, digital universities a role to play in the widening access agenda?
- Enhancing wider participation through innovative distance learning educational models.

Traditional and Innovative HEI structures and Wider Access

The growth in the UK student population has revealed a gaping crack showing that traditional HEI structures are not adequately equipped to deliver the wider access agenda as proposed by the government. This is as a result of lack of adequate resources:

- personnel - lack of adequate numbers of lecturing and support staff;
- financial - inadequate funding;
- physical - lack of appropriate support facilities such as libraries, laboratories and mode of delivery which is based on predominantly full-time, face-to-face attendance etc.

However, the evolution of the ICT has given rise to the development of technology-supported, distributed learning and the emergence of boundary-less, digital universities. These institutions provide an alternative mode of access to education. The success of the e-universities in widening access to and participation in education can be attributed to the provision of "just-in-time", flexible credit courses at anytime, anywhere and at the convenience of the learner. More importantly, the hybrid mode or blended approach of course delivery via face-to-face and/or online, enhances flexibility as well as provides the individual the opportunities to choose a preferred mode of study to match for example, their work and family schedule. The following section provides a brief overview of a successful educational model for widening access in HE.

University of Phoenix (UOP) - A success story for Widening Participation

The UOP is recognised as a leader in adult education. The institution was founded by John Sperling in 1976 and was accredited in 1978 by the Higher Learning Commission of the North Central Association. During the early 1970s, Sperling conducted adult education research on educational delivery systems at San Jose State University. Sperling found that traditional residential universities were neglecting their adult students:

> Other than holding classes at night (and many universities did not even do this), no efforts were made to accommodate their needs. No university offices or bookstores were open at night. Students had to leave work during the day to enroll, register for classes, buy books or consult with their instructors and advisors. Classes were held two or three nights per week and parking was at the periphery of a large campus. The consequence, according to Dr. Sperling was that most working adult students were unable to finish a four-year program in less than eight years, or a two-year program in less than four years (Tucker, 1996, p. 5).

Sperling's research affirmed the importance of having education programs that were adult-centred and sensitive to their needs. He proposed an educational model that focused on adult learners through innovative and student-centred program design, curriculum, teaching methods, and student's services (Swenson, 2001).

The UOP serves a student population of 164,700 who are involved in traditional (i.e. face-to-face) and online classes. The consolidated enrolment of its educational programs makes it the largest private higher education institution in the United States (Fact Sheet, 2002 and Table 1). Students can attend classes online and on-site at 121 campuses that are located in 25 states, Canada and Puerto Rico. The average student age is 34 years old, 54% are female and 46% are male. UOP offers a diversity of degree programs at associate, bachelor, master, and doctoral levels. UOP places a priority on designing institutional goals, programs and learner support services that are sensitive to adult learning characteristics and needs.

Table 1 UOP Five Year Performance

The following is in thousands, except per share amounts and operating statistics.

Year Ended August 31,	2002	2001	2000	1999	1998
Income Statement Data:					
Tuition and other revenues, net	**$1,009,455**	$769,474	$609,997	$498,846	$384,877
Net income	**$161,150**	$107,817	$71,191	$59,005	$46,297
Operating Statistics:					
Degree enrollments at end of period	**157,800**	124,800	100,900	86,800	71,400
Locations at end of period:					
Campuses	**65**	58	54	49	42
Learning Centres	**111**	102	96	80	71

Apollo Group, Inc. (2003).

The ethos of UOP is based on achieving the following purposes:

- To facilitate cognitive and affective student learning-- knowledge, skills, and values - and to promote use of that knowledge in the student's work place.
- To develop competence in communication, critical thinking, collaboration, and information utilization, together with a commitment to lifelong learning for enhancement of students' opportunities for career success.
- To provide instruction that bridges the gap between theory and practice through faculty members who bring to their classroom not only advanced academic preparation, but also the skills that come from the current practice of their professions.
- To use technology to create effective modes and means of instruction that expand access to learning resources and that enhance collaboration and communication for improved student learning.
- To assess student learning and use assessment data to improve the teaching/learning system, curriculum, instruction, learning resources, counselling and student services.
- To be organised as a for-profit institution in order to foster a spirit of innovation that focuses on providing academic quality, service, excellence, and convenience to the working adult.
- To generate the financial resources necessary to support the University's mission (Swenson, 2002, pp. 3-4).

Educational Philosophy

The UOP adopts a student-centred approach when developing degree programs by making them accessible to working adults. The traditional face-to-face classes are offered during the evenings and weekends. The online classes can be accessed through the Internet at any time during the day or night. Classes are usually five to six weeks in length and students normally take one class at a time.

A core of 285 full-time, faculty members provide essential leadership by establishing academic standards and supervising curriculum development. In addition, approximately 17,000 adjunct teachers (part-time staff) who are actively engaged in the teaching and research of their subjects/disciplines are utilized in facilitating students' learning (Fact Book, 2003). This facilitator model is based on rigorous academic standards and expectations, requiring educators who are capable of equipping students to be independent learners. Twigg

(2001) classifies the UOP as a ground breaking online institution that has increased access to higher education while reducing the costs of developing online degree programs by:

- using a centralized course development process to ensure quality control and reduce development costs;
- effectively using educational technology to deliver the same curriculum to more students;
- providing flexible access to classes.

In addition, reasonable completion time, small class size, convenient class time, immediate use and convenient location are reasons why students enroll at UOP (Apollo Group Inc., 2002 p. 11).

The University of Phoenix has been criticized for using a curriculum built with uniformly prepared instructional materials. Traditional educators are concerned that the curriculum restricts teacher creativity and lacks intellectual rigor (Farrell, 2003; Breen, 2003). University leaders respond to this issue by stressing that the curriculum is carefully developed for their degree programs. UOP utilizes a team of faculty members, curriculum managers and instructional designers who develop courses based on the latest theory and practice. The curriculum seeks to affirm program goals while assisting teachers with relevant assignments for their classes. Additionally, teachers create their own lectures and handouts for their individual classes. This enables teachers to integrate their subject expertise into the instructional setting while personalizing the learning environment (Fact Book, 2003).

Altbach (2001) considers UOP a pseudouniversity that offers valuable training but fails to adequately support research, "it would be impossible to foster research activity with part time instructors, scant library or laboratory resources, and no sense of academic autonomy"(paragraph 9). The school does place a heavy emphasis on curriculum and instruction and fewer resources are directed toward promoting faculty research. Educators who want to pursue research studies and publish their work must overcome several unique challenges. Professional writing is often considered a secondary or minor activity to teaching. The organisational structure of distance education institutions is designed to provide support for technology, curriculum and professional development activities. Most online instructors have a full time job besides their online work and have limited amount of time to conduct research and write articles for journal publication (Muirhead, 2002).

The University of Phoenix has been working at enhancing their support of educational research. Faculty members who present papers at conferences and publish journal articles are given financial compensation for their work (Faculty Handbook, 2003). UOP officials have encouraged online faculty members to discuss topics in the Scholars Forum newsgroups that will help establish a clear agenda for future research projects. Additionally, the school plans to produce an academic journal that will promote writing and research activities (Fact Book, 2003).

Widening Access - An innovative model for the UK HE

Currently in the UK, widening access and participation in HE has largely been focused in increasing student numbers through full time study in traditional education settings of Universities, University Colleges or FE Colleges. However, the Open University has since 1971 provided wider access through its open learning and distance education in over 360

undergraduate, postgraduate, continuing professional and leisure courses. To date, its expansion is very far reaching across the globe with a student population of over 200,000 making it the UK's largest university. The OU has currently has a market share of 22% of all part time higher education students in the UK (http://www.open.ac.uk/about/). The university continues to expand access via the use of e-Learning (technology-enhanced learning) and increased involvement in postgraduate research education and training.

The mode of delivery for most distance education courses relies largely on conventional, paper-based distance learning correspondence model, with limited face-to-face meetings. However, technology-supported online learning is being gradually adopted to complement face-to-face delivery or conventional distance education.

Figure 1 depicts a blended distance education model for widening access and participation in education.

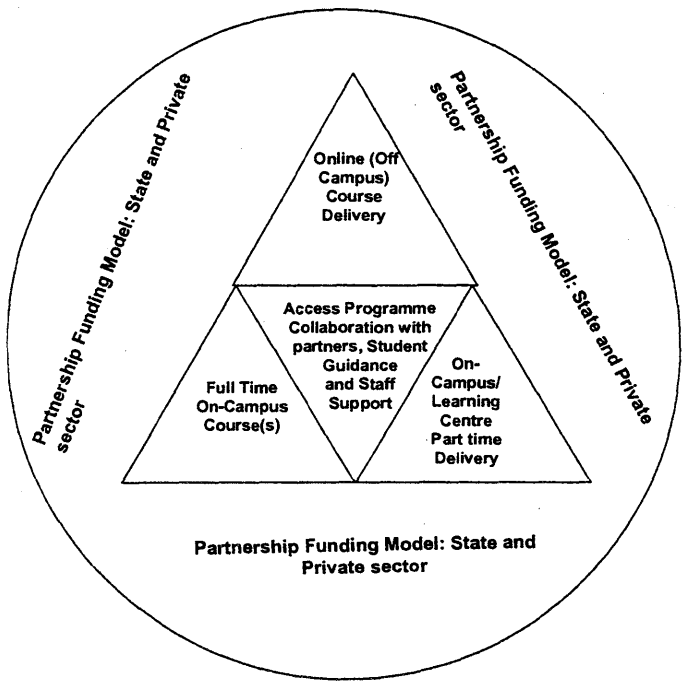


Figure 1. A Blended Approach to Widening Access

As evident from Figure 1, the key to the success of widening access to and participation in HE are dependent on the following:

- ***Resources:*** It is critical that adequate and appropriate resources are provided in terms of personnel: quality staff; technology: ICT and technical support; finance; and physical environment: lecture rooms and library facilities Evidence from the US suggests that state funding alone will not suffice in providing all the required resources for widening access. Hence, it is prudent to suggest that the UK adopt a partnership approach of state and corporate/philanthropic funding. The entry of private/corporate education providers into the UK HE sector will have an important role to play in widening access through injection of much needed financial resources to provide more choices for learners and quality courses at affordable cost. Whilst it

may be a welcome move for private/corporate providers to inject the much needed funding to resource UK HE system, such an approach it may be argued has it downsides and may come at a price. A critical analysis of the problems which may arise from such a funding regime may the following: -

- Firstly, like all things in business, the quality and range of provision of education and training will be dictated by market forces, as investors will want to see a return on their investment;
- Secondly, there is the possibility that the courses are so highly priced that the collorary is the case, rather than widen access, access is denied to students from poor income families as they cannot afford the fees for HE education;
- Thirdly, certain courses that are currently offered for the sake of developing knowledge, seeking the truth and scholarship may be phased out entirely as they are not profitable due to few student numbers to make the course economically viable. Such a scenario will reduce academe from seeking knowledge and truth to the commercialization of education, a phenomenon which critics of commercialization refer to as "the MacDonaldisation of Education";
- Fourthly, the quest to maximize profit may see the recruitment of poorly qualified and low paid staff leading ultimately to a decline in quality of teaching and learning;

- ***Student funding***: With the recent government review on higher education, it is crucial that funding mechanisms make adequate provision for students from working class backgrounds and the ethnic minority communities to encourage their participation in HE Currently, student funding and aid are largely through loans and parental contributions There is need to develop partnerships of corporate and philanthropic funding and assistance to afford poor and disadvantaged students sources of finance to enable them participate in HE. Other funding options may include:

  - the introduction of deferred payment of fees upfront, rather payments of contributions to cost are made after graduation based on a tax system that is related to income;
  - part payment of the fees by the government for students from very low income families http://www.dfes.gov.uk/highereducation/docs/wideningparticipation.pdf);
  - raising the amount of grant for students' from low income families; - a robust career development loan and individual learning account for individuals already employed at work but who wish to study to further develop and enhance their knowledge and career prospects;
  - extension of Universities' grant and scholarships schemes and awards Also, it may be appropriate that tuition tax incentives are made available to enable individuals in employment to embark on continuing personal/professional and/or lifelong learning without the worry of huge course fees and crippling debt.

- ***Innovation:*** As individual learning needs and demands are varied and diverse, it is imperative that innovative approaches to curriculum design, content and mode of delivery are easily adaptable to meet the changing requirements of the educational

environment. These requirements may be dictated by political, social, technological and economic factors. The innovative approach involves the ability to deliver a curriculum that is constructively aligned with the learner's need cost effectively and efficiently, using appropriate blended mode of delivery (as in the UOP's example of 1/3 face-to-face and 2/3 online) or other variations (Juwah, 2003).

In the UK, examples of innovative blended approaches to widening participation in higher education include:

- UHI Millennium Institute (UHIMI)'s use of videoconferencing, computer mediating conferencing and face-to-face to deliver education and support learning in the highlands and islands of Scotland via a federation of fifteen Further Education Colleges, three research institutes and two associated institutions. In this model, the further education colleges provide courses that act as feeder to, as well as enable individual's access to university courses. This form of collaboration between higher education and other educational sectors ensures the progression of students (and in particular students from the under represented groups) from secondary, community and further education colleges to higher education.
- The Open University's multi-modal teaching approach consisting of text, tutorials at study centres and residential school.

http://www3.open.ac.uk/learnersguide/coursechoice/study/our_teaching_approach.htm).

- ***Student Support and Guidance:*** Central to the success of widening access to, participation and ensuring persistence in higher education is students' support and guidance. Awareness raising and appropriate information regarding academic courses, sources of finance, support and preparation for study at higher education should be provided to prospective candidates. Provision of these services is very important as they impact on the students' success. Support programmes such as the GEARUP, corporate and philanthropic mentoring play a crucial role in helping students stay on course and do well in their academic work (Hauptman 2002)

- ***Quality Staff:*** A key success factor for widening access in higher education is quality staff. As Thompson (2003, p.6) stated the UK HE requires "... about 17, 000 extra lecturers are required to hit the government's 50 per cent higher education participation target by 2010". Effective use could be made of appropriately remunerated adjunct staff to deliver quality education at cost effective rates. This model of teacher supply has been proven to work well at UOP. However, as Husbands and Davies (2000) reported in a study of part time teachers in UK higher education, that the financial and working conditions are poor compared to conditions in industry and commerce, that these issues must be addressed to attract more adjunct teachers. Also, to ensure that the adjunct staff are competent and effective in their roles, provision of focused staff and professional development and training is an essential pre-requisite to adequately prepare them to teach face-to-face and/or online.

Conclusion

Widening access and participation to higher education is a key educational policy for the UK government. However, achieving the target of 50% participation by 2010 is quite a phenomenal challenge for the HE sector; particularly, as HE in the UK, in its current state is

almost exclusively state funded. Also, evidence available to date, suggests that HEIs are massively under-funded (UUK, 2002). It is our belief that achieving the government's target is only possible through the following:

1. The encouragement of funding partnerships of the state and corporate sector for HE.
2. The introduction of innovative, blended educational models as depicted in Figure 1 and exemplified by the success story of UOP. This model is critical in delivering a constructively aligned curriculum to meet the needs of the individual learner, at cost effective fees, as well as enabling access to higher education at the individual's convenience.
3. The provision of adequate student and staff support.

References

ALTBACH, P. G. (2001). The rise of the pseudouniversity. International Higher Education. Available at: http://www.bc.edu/bcorg/avp/soe cihe/newsletter/News25/text001.htm

APOLLO GROUP, INC. ANNUAL REPORT (2002) Phoenix, AZ.

APOLLO GROUP, INC. (2003) Investors relations: Financial reports. Available at: http://www.apollogrp.edu/Company_News/index.htm

BREEN, B. (2003). The hard life and restless mind of America's education billionaire. Fast Company. Available at: http://www.fastcompany.com/magazine/68/sperling.html

CURTIS, P. (2002) Guardian Newspaper, Friday May 31

Dearing Report (1997) *Higher Education in the Learning Society*. Report of the National Committee of Inquiry into Higher Education, London: HMSO and NCIHE Publications. Available at: http://www.leeds.ac.uk/educol/ncihe/

FACT SHEET (2002, DECEMBER) About the University of Phoenix. Available: http://www.phoenix.edu/Factsheet.pdf

FACT BOOK (2003). University of Phoenix.

FACULTY HANDBOOK (2003). University of Phoenix.

HUISMAN, J., WEERT, E., & BARTELSE, J. (2002) Academic careers from a European perspective: The declining desirability of the faculty position. *The Journal of Higher Education*, 73 (1), pp. 141-160.

FARRELL, E. F. (2003). Phoenix's unusual way of crafting courses. *The Chronicle of Higher Education*, 49 (23), p. A10.

HAUPTMAN, A. M. (2000) Participation and Persistence in Postsecondary Education in the United States: Review of Federal and State Policies. Summary Background Paper Prepared for the Policy Forum on Higher Education Access and Success in the UK and the USA.

HUSBANDS, C. T. AND DAVIES, A. (2000) The Teaching Roles, Institutional Locations, and Terms and Conditions of Employment of Part-time Teachers in UK Higher Education. *Journal of Further & Higher Education*, Oct, Vol. 24 Issue 3, pp. 337 – 362.

INVESTOR FACT SHEET (2002, AUGUST) Apollo group, Inc. Available at: http://www.apollogrp.edu/Investor_Relations/factsht.pdf

JUWAH, C. (2003) Blended Learning In Practice: Supporting sustainable quality education and training. Paper presented at the International Conference of the Society for Educational Technology, Research and Development of India (SETRAD), 22 – 23 February.

LEWIS. B. (2002) Widening participation in higher education: The HEFCE perspective on policy and progress. *Higher Education Quarterly*, 56 (2), pp. 204-219.

MUIRHEAD, B. (2002). Teacher-as-Researcher. *USDLA Journal*, 16 (9). Available at: http://www.usdla.org/html/journal/SEP02_Issue/article07.html

OPEN UNVERSITY UK (2003) About us. Available at: http://www.open.ac.uk/about/

SWENSON, C. (2001) New models for higher education: Creating an adult-centred institution. Globalisation: What issues are at stake for universities? Available at :http://www.ulaval.ca/BI/GlobalisationUniversities/pages/actes/Craig-Swenson.pdf.

THOMPSON, A. (2003) Do we need the 50% target. *Times Higher Educational Supplement*, pp. 6-7.

TUCKER, R. S. (1996) From the void: An interview with John Sperling. *Adult Assessment Forum*, 6 (2).

TWIGG, C. A. (2001) Innovations in Online Learning: Moving Beyond No Significant Difference. Available at: http://www.centre.rpi.edu/PewSym/mono4.html#Anchor-III-49575

UHI Millennium Institute (UHIMI) – http:www.uhi.ac.uk UK GOVERNMENT (2003) The Future of Higher Education.

UK GOVERNMENT (2003) Widening participation in Higher Education. Available at: http://www.dfes.gov.uk/highereducation/docs/wideningparticipation.pdf

Universities UK [UUK] (2002) – Universities' performance holds up despite underfunding. Available at:

http://wwww.universitiesuk.ac.uk/mediareleases/show.asp?MR=32

Personal Development Planning: pulling student support together

Patrick Kelly and Frauke Noelker
The Open University, UK

What is Personal Development Planning?

Personal Development Planning (PDP) is known by a variety of names including: a Progress File, Learning Log, Development Profile and Personal Portfolio. Regardless of the name, the process is concerned with planning and managing learning, personal and career development and is equally applicable to pupils at school and adults in employment.

In the UK, the context for Higher Education is the recommendation by the government sponsored National Committee of Inquiry into Higher Education, better known as the Dearing Inquiry (Dearing, 1997) that institutions should develop a Progress File comprising:

- a transcript recording student achievement
- a means by which students can monitor, build and reflect upon their personal development, defined as

> 'a structured and supported process undertaken by an individual to reflect upon their own learning and achievement, and to plan for their personal education and career development'. (Universities UK, 2001)

The development of Personal Development Planning/Progress Files (the terms are often used interchangeably) is seen as supporting higher education and government objectives in relation to widening participation, enhancing student learning and supporting employability.

PDP is not just a higher education initiative. The Department for Education and Skills (DfES) is piloting a Progress File for schools and colleges. The introduction to the schools version describes its purpose:

> It's a process people of all ages can use to make progress, and achieve more. It helps you to be more in control of your learning, your personal development and planning for your future. It is about making improvements and seizing opportunities, both personally and academically.
> Progress File helps you identify and value your skills and qualities, recognise your achievements and then use that information to make better choices for the future.
> Progress File helps you learn how to sort and select information to present to various people as you move through stages of your career. It can help you when you need to 'sell yourself' or explain where you are coming from and where you want to go. (DfES, 2002)

Nor is PDP restricted to education. Many professional organisations expect their members to keep a record of their professional development, to identify ongoing learning or training needs, and be responsible for keeping their knowledge and skills up to date.

Where Does PDP Come From?

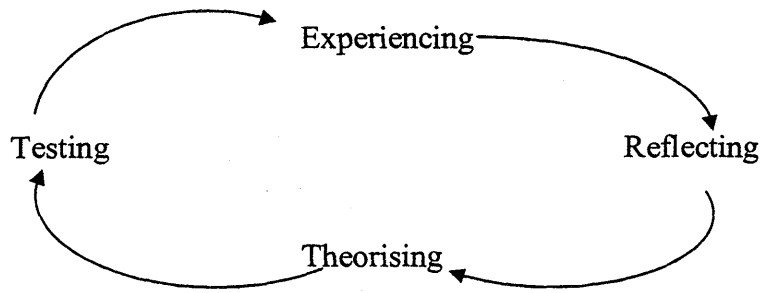
There are several strands which feed into PDP

- ***Reflective Learning***

  There is a strong emphasis throughout education on active learning, on enabling the student to understand how they learn, what they are learning and how they can learn more effectively by planning and reflecting on the learning process.

  Kolb's model (Kolb, 1984) of the learning cycle has been very influential, and at heart, is very simple. Much learning occurs as a result of reflecting on experience, refining theories or ideas, testing out the revised ideas in practice, and once again reviewing the practice as part of an ongoing cycle:

Fig. 1



  Kolb's work has been used to help students (and their teachers) better understand their learning styles and develop practical strategies to 'learn how to learn'.

- ***Managing Learning and Progress***

  One of the perennial difficulties for Open and distance learning is the geographical separation of the student from the institution. It can be difficult for students to manage effectively when they must fit study around work, family and other commitments and without regular contact with fellow students or tutors. It can be equally difficult for institutions to keep track of and support progress over the many years needed to complete a degree by part-time study.

  The phenomenon of the isolated student is no longer restricted to Open and distance learning. In the UK there has been a significant increase in the numbers entering conventional higher education but without matching resources, leading to higher teacher student ratios and much greater reliance on mass teaching in lecture theatres. There has also been a shift to more modular degrees weakening faculty responsibility for the individual student and student identification with the faculty. The personal tutor role, never particularly robust, effectively faded away under the pressures of higher teaching loads and the requirement to be research active.

The price has been students lost in the system, poor oversight of progress and increasing drop-out rates. As a result there is fresh interest in helping students to manage their own learning and the personal tutor is being reinvented as a study adviser responsible for monitoring progress and offering guidance on planning studies. ICT often has a crucial role. Most students have access to or own a PC with an internet connection and the networked university is becoming a reality with faculty websites, bulletin boards and email, linking students with their tutors and the university.

- ***Employability***

There are clear (though not always straightforward) links between education and employment. There is a general assumption that high educational attainment is related to success in employment as measured by income, status and job security and that students will acquire knowledge and skills relevant for work.

There is considerable international debate about the match (or mismatch) between higher education, economic needs and general social values, and many studies (e.g. Little, 2003) have examined student and employer perspectives on valued skills and competencies.

There is evidence from the UK including recent research commissioned by the Open University (Open University, 2002) which suggests that employers are uncertain about the status of a degree. There are concerns about the standing of some universities and worries about the standards of modular degrees and degrees in new subject areas. Possession of a degree or even a good class of degree is no longer an adequate discriminator when around 40% of school leavers continue into further or higher education. There is now a focus on documenting and evidencing achievements, knowledge and skills, and assisting students to present themselves and their capabilities to prospective employers.

- ***Learning Outcomes and Key Skills***

There is an increased emphasis on making explicit the intended outcomes of learning from a higher education programme, again driven by the Dearing Report. (Dearing, 1997).

'We recommend that institutions of higher education begin immediately to develop for each programme they offer, a 'programme specification' which identifies potential stopping-off points and gives the intended outcomes of the programme in terms of:

  - The knowledge and understanding that a student will be expected to have upon completion;
  - Key skills: communication, numeracy, the use of information technology and learning how to learn;
  - Cognitive skills, such as understanding of methodologies or ability in critical analysis;
  - Subject specific skills, such as laboratory skills'.

Currently there seem to be dozens of skills lists each with a different name – core skills, transferable skills, employability skills – but whatever term is used there are underlying similarities. What is being identified is a set of skills and capabilities which are properties of being a graduate, not of a particular subject area and which are transferable to the workplace. It is estimated that half of all graduate entry jobs in the UK require no subject specific background and the language and processes of learning outcomes, key skills and PDP are equipping students to move from describing the content of the courses they have studied to identifying and presenting their subject specific knowledge and generic cognitive and practical skills.

How are the Strands Coming Together?

Universities are developing PDP in a variety of ways to suit their own needs and cultures. National information and case studies can be found at the Learning and Teaching Support Network and Centre for Recording Achievement websites.

Gathering the separate initiatives together gives a composite which isn't accurate for any single institution but does reveal how PDP is being developed in practice. Learning outcomes are being used as practical resources for teachers, students and employers. Students can plan their studies each year by checking how individual course modules fit into the overall learning outcomes for the programme. Students who drop-out part way through have a record of knowledge and skills achieved on the modules studied rather than nothing at all. Online PDP systems offer students a proforma record of achievement and CV building tools and schedule periodic review meetings with the student's personal tutor.

Skills audits and skills development are an important element of many PDP systems. New students may be required to take diagnostic tests which assess subject specific or general academic abilities, often in areas such as maths, statistics and computing skills which are linked to study skills programmes in the first terms.

The emphasis on making the intended outcomes of study explicit in terms of the knowledge and skills acquired also provides the headings for key sections of a job application : subject specific knowledge, understanding and practical skills; generic cognitive/intellectual skills; and key transferable skills. This is a manageable framework which helps students communicate clearly and concisely with employers.

How is PDP being developed at the Open University?

The core PDP goal of improving the capacity of individuals to understand what and how they are learning and to plan, review and manage their learning and development is common to all institutions. But there are aspects which may have particular significance for open and distance education. For the Open University these include:

- ***Openness***

  The Open University is committed to widening participation. There are no admissions requirements for most courses and around 40% of undergraduates lack formal university entry qualifications. This places a responsibility on the university to help students assess their readiness for HE study, and to support induction,

preparation and learning skills development in order to help students succeed with their studies.

- ***Planning a coherent study profile***

  The Open University has a modular undergraduate curriculum which offers considerable freedom of course choice, but this freedom could become confusion of choice. Students can take single courses, several courses in a particular subject area, or study for qualifications including a named or a general degree. Students are confronted by the total flexibility of the original BA Open alongside Named Degree programmes, and it is not even necessary to register for a qualification. A quarter of all telephone calls from enquirers and students relate to course choice and the majority are seeking advice about planning a coherent programme of study.

- ***Personal and Career Development***

  Some students may study for a few weeks or months, others for several years. It can easily take six plus years to graduate and much can happen in individuals' lives during this time which leads them to reflect on their interests and goals and often to change direction.

  Students can be divided into three roughly equal groups: those studying for personal reasons, those for career reasons and thirdly, a combination of the two. Frequently, goals alter as a result of the experience of study. The learning process is often a key agent of change as students gain confidence in their knowledge and skills and seek opportunities for personal, community or career development. Around 40,000 students seek careers related information or advice annually.

- ***Recording Achievements***

  Many Universities use PDP to support the transition to employment by enabling students to record the academic knowledge, skills and achievements associated with their degree in much more detail. Research with employers has shown that they also value personal qualities and attributes which are not the outcomes of formal study.

> We like people who are self-motivated, people who can motivate others, people who are good communicators, people with energy and enthusiasm. People who have analytical minds and who can analyse what we do and how we can do it even better. People with good interpersonal skills. People with a certain warmth about them. People you can chuck into a group they've never met before and you think here's somebody who's got something. And that's not always definable. They're so obviously at ease with the people around them, so quick at picking things up, able almost to make a contribution from the beginning. Then you've got the right one. (Open University, 2002)

Many adult learners feel at a disadvantage in the labour market in comparison with younger graduates but they may well possess through their current and past study, work and personal experience, many of the skills valued by employers, including for example, leadership, planning and organisation, team working, communication, creativity, problem solving and information technology skills. The degree is only part of what the adult student has to offer,

and there is anecdotal evidence that some employers are less interested in the possession of a degree or the subject knowledge than in what the decision to study says about the individual. Here is someone who is ambitious, is willing to take on the workload associated with part-time study, able to prioritise their commitments, skilled at organising and scheduling their time, highly motivated and sufficiently disciplined to stick with their studies perhaps for several years.

These considerations have shaped the broad learning outcomes for the Open University approach to PDP which aims to enable students to:

- acquire an understanding of supported open learning methods and have the motivation, self confidence and skills to make a successful transition into HE;
- make an informed choice of courses and plan a coherent study profile which meets their personal, educational and career objectives;
- draw on a range of resources throughout their Open University studies which help them to improve their learning and support study progress and retention;
- record learning and other achievements and skills acquired through prior experience and Open University studies which they can use for personal and career development purposes.

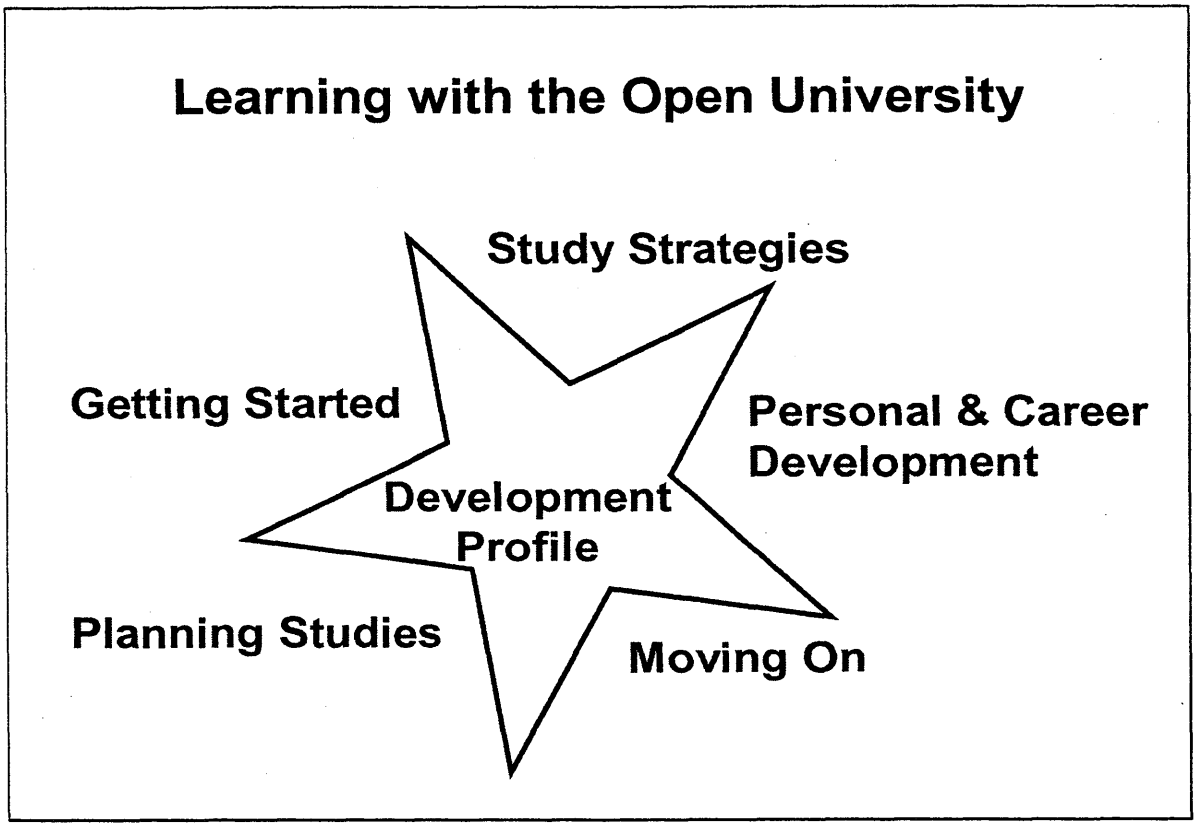
These provide a focus for the project, and priorities include:

- offering an introduction to Open University study methods to help students make a good start with their studies;
- offering practical support for assignments and examinations by helping students to plan, review and improve their learning;
- enabling students to identify their needs and make effective use of a comprehensive range of learning skills resources;
- enabling students to plan a coherent study profile, whether a few courses or a programme of studies leading to an award;
- enabling students to record and keep a personal log, a Development Profile of knowledge and skills gained through their Open University studies and also from past education, training, employment and personal experience;
- enabling students to draw on their Development Profile to identify continuing professional development needs or to generate a CV or support a job application.

The processes of reflection and planning are built into many aspects of the Open University teaching and learning system, through e.g. course materials, correspondence tuition, admissions advice, tutorial contact, course choice and careers resources and guidance. The PDP project aims to pull many strands together and is based on the concept of the student study career, offering resources which support the processes of learning, review, recording achievement and planning from registration to the completion of studies.

PDP will make extensive use of web-based resources, drawing on and extending the online materials already available and organised under the banner of 'Learning with the Open University'. The goal is to provide a baseline of university level resources that Faculties can use, modify, supplement or reshape to meet particular requirements.

Fig. 2



At one level there is little about PDP which is completely new apart from the Development Profile. The star diagram above is just another way of representing many aspects of learner support in a holistic way, and yet it has proved to be a useful critical tool. Currently the Open University does not provide resources or offer any specific support to students at the completion of their studies to identify 'where next' opportunities. Students can request advice but there is no review as standard around the time of graduation to consider further study, training, professional or career development opportunities.

The Open University takes pride in the system of supported open learning and the extensive range of learner services. But the diagram has helped to highlight the extent to which student support has been divided into separate areas which are not as well integrated as is generally imagined. There are written and online learning skills materials but they are not available to enquirers even though worries about readiness and coping with university level study deter some of those who are potential students. Choosing courses and career development are often linked yet much of the course choice information only mentions careers superficially and much of careers material does not draw out implications for planning a relevant programme of courses. One of the real benefits of PDP has been to look again and to ensure that connections are made between the various elements of the learner support service.

Will Students Engage?

PDP has a mixed record. In some occupationally related subject areas PDP is a core part of the course and students start a record of knowledge, skills and achievements which will stay with them throughout their professional career.

However students may not see the value or regard PDP as just an additional burden. PDP has usually been successful when students can clearly see 'what's in this for me'. Institutions or individual departments have tended to take one of two approaches: compulsion, where PDP is embedded within a degree, is an assessed component or a requirement for professional recognition; or inducement, where PDP is presented as supporting learning and employability. The Open University has no immediate plans to assess PDP (though a short course called Open to Change is available) and the aim is to offer students practical resources which they can use throughout their study career.

But do hard pressed students really have the time? There is an abundance of feedback which shows that students have difficulty fitting study into already busy lives but there is also evidence that students will make time for things which they find useful. Around 25,000 students a year request study skills materials, 20,000 request careers publications, 14,000 attend induction, preparation or study skills workshops and 10,000 attend course choice meetings. Students are also increasingly using the online learner support resources. The home page for the Courses and Qualifications website containing descriptions of the courses and programmes receives 200,000 visits a month and there were 3.5 million page requests in 2002 on the Learner's Guide website which contains most of the support and guidance resources.

So, there are reasons to believe that at least some students will dip into or extensively use PDP resources to plan, support and review their learning and development. PDP is likely to be most effective if the student has access to personal support and if PDP is fully integrated into the course teaching materials. And this is where there is the greatest concern. PDP is designed for the programme of study, supporting the student at each stage of the learning journey. However, unlike most conventional universities, the programme is not central to internal policy and structures and processes, curriculum design or teaching and learner support. Programme identity is generally weak in the Open University and the core curriculum building block is the individual course module which students accumulate towards a qualification.

As a result, the university has limited understanding of or ability to address the student in the context of the study career as a whole. The role of the tutor-counsellor, the one element originally intended to provide personal continuity across the individual courses, has recently been abolished and though other models are being explored there is no replacement yet. Some of the fundamental structures of the Open University present major challenges for the implementation of PDP. Or, to put it the other way around, the requirement to introduce PDP presents some major challenges for the Open University.

References

DEARING, R et al (1997) *Higher Education in the Learning Society*, report of the National Committee of Inquiry into Higher Education, HMSO, Recommendation 20.

UNIVERSITIES UK, et al (2001) Guidelines for HE Progress Files, p1.

DEPARTMENT FOR EDUCATION AND SKILLS (2002) Progress File: Getting Started, DfES, p4.

KOLB, D.A. (1984) *Experiential Learning: Experience as the Source of Learning and Development*, Englewood Cliffs, New Jersey, Prentice Hall.

LITTLE, B. (2003) *International Perspectives on Employability, Enhancing Student*

Employability Co-ordination Team, Learning and Teaching Support Network. ESECT/LTSN briefing paper.
OPEN UNIVERSITY (2002) Arts Faculty Research, Qualitative Debrief, DVL Smith Ltd, internal Open University briefing report.

Useful web links

Department for Education and Skills: www.dfes.gov.uk/progfile/index.cfm
Centre for Recording Achievements: www.recordingachievement.org/
Learning and Teaching Support Network: www.ltsn.ac.uk/

Supporting Open Learning in a changing environment: the SOLACE project

Janet Macdonald and Liz Bennett
The Open University in Scotland, UK

The use of electronic media has challenged our approaches to supporting students in a variety of ways. Asynchronous electronic media offer the potential for joining up people and resources, sharing information between staff and students regardless of time and geographical considerations. Word processing offers the potential for making wider use of both teaching resources and contributions from students from one teaching year to the next.

Email use alone has potentially dramatic implications for the support of students. Email is simple to use, effective, and widely available. It has opened the floodgates to a flow of communication between individual students and academic staff which was previously not available, and may not always be welcome, to overworked staff.

However, many questions on student support remain. For instance, do we have a common understanding across disciplines and Faculties of what constitutes an effective student support strategy? To what extent does the model of support delivered in a face-to-face tutorial transfer to an online asynchronous environment, and what is economical in tutor time and resources? Is there a case for retaining synchronous face-to-face tutorials alongside online student support?

Online use and student support

Much has been written on effective approaches to the use of online media and it has been successfully demonstrated in a wide variety of disciplines, including Technology (Kear & Heap, 1999); Business Studies (Salmon, 2001); Humanities (Tolley, 2000) and Maths (Thomas & Carswell, 2000). It seems to be effective both for discursive subjects as well as more analytical subjects.

However, much of the research effort has focused on the evaluation of courses where all support and mediation is delivered solely through computer conferencing. There are certainly indications that even for web based courses it may not necessarily be appropriate to rely solely on online tuition; indeed current thinking (Mason, 2002) is that a combination of real time contact such as telephone, or face-to-face tutorials, with asynchronous media such as email or conferencing may well prove to be more helpful to students.

At the UK Open University, we face a major challenge in planning an effective staff development strategy for our part time tutors. At the same time, we need to know how to advise them in appropriate use of the media for student support. There is widespread interest in the use of online media for supporting students, and University policy is a driving force in this area. But there is wide variation in the extent to which online media are employed. While some courses reach certain student markets by employing an "all online" solution using email or computer conferencing, on the majority of courses a blend of real time contact such as telephone, or face-to-face tutorials, with asynchronous media such as email or conferencing is presently in use.

On the premise that the variation in tutorial support practices may be of interest and relevance across Faculties, and even across Universities, we have been seeding and encouraging, interdisciplinary communities of practice around an action research project: SOLACE (Supporting Open Learners in A Changing Environment). There is an established literature on the effectiveness of learning achieved within communities of practice, and their impact on levels of personal engagement for the individuals involved. In fact, Beaty, Cousin & Deepwell (2002) describe the potential of these communities as an agent for change management. There is clearly scope for exploring their use in other contexts (Lave & Wenger, 1991) for engaging practitioners in reflective approaches to their own professional development. These ideas have informed our thinking in devising the SOLACE project.

Models of student support

Thorpe (2002) provides a useful definition of student support in Open and distance learning as "all those elements capable of responding to a known learner or group"; in other words, it is the human face of course presentation. There are three key elements in her definition: *identity*, in other words the ability to deal with the needs of identifiable individuals; *interaction*, the ability to be responsive to student needs; and *time/duration,* the ability to maintain contact throughout the course. These elements effectively define the job of the tutor.

For most courses at the Open University, course materials are written and produced by a central Course Team and distributed at scale to a large student population. These materials generally have a life of a number of years.

The "human faces" of the Open University are its part-time tutors who support students largely at local level. Each tutor is responsible for a group of students, which may vary in size depending on the geographical distribution of students and tutors and the popularity of particular courses. Some tutors may provide support to one group on one course, others have a portfolio of courses and large numbers of students.

Support is provided at an individual level through correspondence tuition in response to assignments which are spaced at regular intervals throughout each course. There is also support to the group as a whole, traditionally delivered through a programme of tutorials. The scope of correspondence tuition is largely defined by the assessment strategy of the course and University policy in the provision of assignment feedback, but tutors have more latitude in the way in which they provide tutorials for which attendance is optional on most courses.

The University distinguishes three types of course in terms of their use of online media. For *web intensive* courses, all teaching and student support is delivered online. On *web focused* courses, the use of online is a required element of teaching support, which means students must be online and it is generally used alongside other media in learner support. Finally, *web enhanced* courses have access to a number of online services, but students are not required to be online, although some will be using email. These distinctions are reflected in course design and philosophy and have a significant influence on the strategic use of online media by the tutors employed on respective courses. However, within these general parameters, there is scope for individual tutors to adapt their use of media to the particular needs of the group.

The SOLACE project

The SOLACE project is conducting a qualitative study of tutor-student intervention and the role of online media, by seeding a community of practice in which participant tutors share their experiences of supporting students with fellow practitioners. Since Open University tutors may be geographically widely distributed, the project is using an asynchronous computer conference as the platform for their shared reflection. In order to create a structure for this reflective practice, and to ensure that the members of the group are working to the same aims and objectives, they are asked to contribute logs of their student support activities and interventions with students at significant points of the course presentation year.

We have recruited forty tutors, to represent a wide diversity of courses, from a range of Faculties and levels (see fig 1). Although they are all themselves online and have a basic familiarity with FirstClass, the extent of their use of online media for the support of students varies widely. In addition to web enhanced, web focused and web intensive courses described above, some participants are responsible for tutorial groups where online use is optional for the course as a whole, but encouraged for their group. In some cases this is because of geographical considerations, in other cases tutorial groups have been amalgamated so that students can opt for face-to-face, or electronic tuition.

SOLACE tutorial groups include students who are geographically remote as well as those living in urban environments. In addition, two tutors support students in prison and three have students in Continental Western Europe.

All participants share a concern to enhance their current practice and to investigate new approaches to the support of students. We anticipate that these common purposes will unite the group and provide an important motivation to sustain participation. We recognise that as a group they probably represent the more reflective tutors: this is an advantage in studying future trends in use of online media for student support, but it also means that they are unlikely to represent present levels of intervention across the whole tutor population.

Figure 1: SOLACE Participants

Faculty		**Course online use**	
Arts	6	Web intensive	3
Social Sciences	4	Web focused	12
Education/Languages	6	O/L encouraged	6
Health & Social Welfare	3	Web enhanced	20
Maths & Computing	6		
Science	8	**Course level**	
Technology	4	Foundation	15
Business School	3	Post-foundation	22
Institute Educational Tech	1	Post-graduate	4

Data collection and analysis

Participants were asked to log their interventions with students, and to join in a computer conference with fellow participants. The project focuses on three recording periods: five weeks in February and March (for most OU courses, the start of course presentation; four weeks in June (mid course), and four weeks in September (at course end). At the time of writing, we have completed the first of these recording periods. Participants were provided

with a simple log proforma, and were randomly allocated a week in which to record their interventions with students.

Figure 2: Sample log of student contact

Course: Mediaeval Mythology
No. Students: 15
Week no.: 33

Nature of intervention	*Medium used* PT3	Letter	F to F	Tel	Tel Conf	Email	C Conf	Other
No. contacts		1	1	3	1	5	2	
No. students		1	3	3	4	5	1	
Administrative (introduction/dates/agendas/hols)			×	×	×	×		
Encouragement/lifestyle related			×	×	×			
Reinforcing concepts/course content (explanations/egs/alternative			×		×	×		
Assignment prep			×	×		×	×	
Assignment feedback								
Process of study (critical thinking/writing			×				×	
Other		×						

This tutor had a very busy week. She responded to 5 emails, covering a mixture of functions. She put 2 msgs in a computer conference for students, (which only one person read!) and ran a tutorial (attended by 3 students) and one telephone conference. She was also on the phone to individual students. Here are some of her comments:

The encouragement/lifestyle contacts were "propping up" students with their ECA - mainly initiated by the students. They consisted of both academic advice and general "You'll be alright, don't worry" noises. The f to f contacts were the last tutorial. I believe it was really valuable to those who attended.

This meant that each week a small group of tutors uploaded their logs to the conferences, together with their comments of the week's activities and participated in discussion with fellow tutors on their reasons for adopting particular strategies to student support. In this way we hoped to maintain interest by "drip feeding" the conference with items of topical concern.

Both conferences were moderated by fellow tutors with experience of computer conferencing, so that they operated effectively as peer support groups. These moderators encouraged participation, dealt with queries on procedure and helped those who were unfamiliar with the software. Short questionnaires, containing two or three questions, were delivered to participants using the computer conference, in order to follow up any points of general interest requiring clarification.

The initial findings were collated and presented to the group for comment on the Solace computer conference as a form of respondent validation. In addition, the project held a face-to-face seminar for participants, at the end of the first recording period, in order to discuss project findings to date and to discuss future directions. As a result of this discussion, and the lessons we have learnt from the initial recording period, the log proforma will be refined for the next recording period.

There are, no doubt, many benefits to participants in reflecting on practice in this structured way. However it has proved hazardous as a method of data collection because of the variations in respondents' interpretation of the logs. Logs required extensive checking as they were submitted, and outstanding points or inconsistencies were followed up by email or

telephone. In addition, completion of the logs, which were in a spreadsheet file to facilitate data collection, created difficulties for some respondents who either did not possess spreadsheet software or were unfamiliar with its use.

The technology itself also created hurdles. The use of conferencing with participants from all Faculties meant that we had to make use of three gatewayed servers. Messages were regularly lost between servers and had to be re-posted, so that online debate was fractured at times.

Analysis of the logs is ongoing, and the following account describes our preliminary findings together with some of the trends identified from an iterative reading of conference transcripts.

Patterns of tutor-student intervention

Interventions to groups and individuals

Not surprisingly, the logs indicate that in addition to contact with the group through tutorials or computer conferences, an average tutor week included five emails and three phone calls to individual students. The burgeoning use of email by students is a particular concern to the University, indeed Carswell et al (2000) report that students on an online presentation of a second level Maths course contacted their tutors four times more often than those on the conventional presentation. However, we should not overlook the level of traffic by telephone with individual students, and this can be significantly more intrusive.

There were wide variations in tutor workload from week to week. Some tutors found that their allocated slot was a "quiet week", while others were very busy with student contacts.

It appears that certain major triggers resulted in a vortex of activity both with the group and with individual students. These triggers were the assignments, tutorials and the introductory contact which tutors are required to make with their students.

For example, before assignment submission there were requests for a submission extension, but often this related to affective or motivational problems, or to queries on course materials, or assignment wording. After the marking period, some tutors took the opportunity to reinforce course concepts to the group as a result of misunderstandings which became apparent from assignment marking.

Respondents describe a similar period of activity before and after a tutorial. One of the major reasons for this was to encourage participation and to "round up the stragglers". Some tutors sent out an agenda or preparatory notes before a tutorial, while others sent out notes afterwards to the non-attenders: these interventions often triggered responses from students. It was a valued opportunity to keep up with individual student progress.

> "I find it useful to be in quite close contact with students at this particular point [course start] for various reasons: on the one hand there are some "remote" living students, who will not be able to attend tutorials. I would obviously like to know how they are getting on. On the other hand, I am also keen to set up self-help groups at the moment...I often get quite a good impression of how students are coping at that time and where they anticipate problem". (*Languages tutor*)

> "...even if they can't manage the tutorial, I can check out progress with them, and offer encouragement...I can reassure students who are unsure of doing this kind of tutorial, and explain what the tutorial will be about...I have immediate feedback about the suitability of the date and how many are likely to take part." (*Technology tutor*)
>
> "I had one telephone contact concerning a late submission. When I quizzed her about what she had already done, I realised that she was on the wrong track so I discussed the idea of theory/perspectives and their inclusion into the essay (about 15/20 minutes)." (*Social sciences tutor*)

In this way, interventions which might appear to be well defined in terms of tutor time and outcomes, are in fact acting as a trigger for a range of more informal contacts with individuals and the group as a whole.

In an electronic environment, the distinction between interventions with a group and those with individuals is not as watertight as it might be using telephone or face-to-face tutorials or handwritten comments on a script. Once in electronic form, the content of the intervention can readily be adjusted to meet the needs of sub-groups of students or of individuals.

> "I do find it very useful to copy the same message and send it to a larger group, sometimes with modifications. For example, after my last telephone tutorial with the Argyll group I could get feedback and also chased up an agreement about the next convenient date." (*Humanities tutor*)
>
> "I had just finished marking TMA02...so I emailed my feedback to each student...This encouraged a dialogue with several students who asked for some guidance with the next assignment." (*Educational Technology tutor*)

The use of online media for enhancing assignment feedback has been observed in other contexts (Macdonald, 2001) and illustrates the way in which online media can extend traditional methods of learner support. At the same time, they can lead to a chain of contacts: when interventions such as those described by the Languages, Social Science and Technology tutors are conducted electronically, they may extend over several emails as the conversation "evolves" and a range of concerns is covered.

Purpose of intervention

Participants were required to record the purpose of their interventions, whether they were administrative, covered course concepts, encouragement, or were lifestyle related, and so on. It was clear that the majority of interventions covered a number of categories, and this is exemplified by the comments we have already used in this paper. Analysis is ongoing and numbers are small; however, figures for tutorials and computer conferences make an interesting contrast in the differences in usage made of these media in these first few weeks of the course. Not surprisingly, tutorials have covered a range of areas and discussion on course concepts figures widely. But computer conferences and email lists have been used for administration more than other purposes.

Figure 3: Purpose of intervention

Overall pattern of use	Tutorials		Computer conferences and email lists	
no of tutors	11		18	
Administrative (introduction/dates/agendas/hols)	3	27%	11	61%
Encouragement/lifestyle related	5	45%	7	39%
Reinforcing concepts/course content (explanations/egs/alternative perspectives)	10	91%	7	28%
Assignment prep	4	36%	5	17%
Assignment feedback	0	0%	3	28%
Process of study (critical thinking/writing appropriately/use of evidence)	7	64%	4	22%
Other	0	0%	5	28%

Who were the participants using online media in this context and what were they doing? The majority (12 tutors) were associated with web focused courses for which online is a required element of learner support, although online tuition may be restricted to certain points in the course. All these tutors were running tutorials for their students as well.

Where online conferencing is an integral part of the course and students are assumed to be using FirstClass from the start, the tutor group conference can become the *main channel of contact* between the tutor and their students, although it may not necessarily be used for tuition throughout the course, or in the same way as a tutorial.

There are many reasons why tuition in the conventional sense of the word is not in general, or continuous use within tutor group conferences and they relate to the "critical mass" of active participants needed (Mason & Bacsich, 1998); their levels of competence and confidence (Salmon, 2000); and the degree of integration of online activities with the assessment (see for example Macdonald & Twining, 2002).

There may also be elements of face-to-face tutorial work which transpose more readily to an online group environment than others. Carswell et al (2000) report that for their online presentation, some of the aspects of conventional tutorials such as diagnosis of students' understanding and problems and also "problem sharing" moved into individual communication. It may be that a similar pattern will emerge in other courses and contexts.

Discussion

A shifting balance of communication between individuals and tutorial groups challenges existing preconceptions about appropriate practice for supporting students. It may even erode the bastion of tuition to the individual: correspondence tuition. For example, how much assignment feedback is better shared with a group, who have the capability to discuss the

implications and application to their particular circumstances; and what needs to be communicated to the individual, and in what timeframe?

An emerging role for tutor group computer conferences as a main means of keeping touch with students may help to alleviate tutor load, in rationalising the support to individual students, so that those most in need might be targeted. Ultimately the success of a learner support strategy will be measured by its ability to support student learning and maximise student retention, while being cost effective. We need to have these goals firmly in view when considering ways of optimising the media.

References

BEATY, L., COUSIN, G. & DEEPWELL, F. (2002) Introducing networked learning via a community network: a teaching and learning strategy in action. *Networked Learning 2002*, pp. 36-40.

CARSWELL, L., THOMAS, P., PETRE, M., & PRICE, B. (2000) Distance education via the Internet: the student experience. *British Journal of Educational Technology,* 31 (1), pp. 29-46.

KEAR, K. & HEAP, N. (1999) Technology supported group work in distance learning. *Active Learning,* 10, pp. 21- 26.

LAVE, J. & WENGER. E. (1991) *Situated learning: legitimate peripheral participation* (CUP).

MACDONALD, J. (2001) Exploiting online interactivity to enhance assignment development and feedback on an ODL course. *Open Learning*, 16 (2), pp. 179-189.

MACDONALD, J. & TWINING, P. (2002) Assessing activity based learning for a networked course. *British Journal of Educational Technology,* 33 (5)

MASON, R. (2002) E learning: what have we learnt? *Proceedings 9th Improving Student Learning Conference*, Edinburgh 2001, pp. 27-34

MASON, R. & BACSICH, P. (1998) Embedding computer conferencing into university teaching. *Computers and Education,* 30 (3-4), pp. 249-258

SALMON, G. K. (2000) *E moderating: the key to teaching and learning online.* (Kogan Page)

SALMON, G. K. (2001) 'Management learning in the electronic age', Presented to *Collaborative Learning*, London, 25 - 26 April.

TOLLEY, S. (2000) How computer conferencing affects the way we teach. *Open Learning,* 15 (3), pp. 254-265

THOMAS, P. & CARSWELL, L. (2000) Learning through collaboration in a distributed education environment. *Educational Technology & Society,* 3 (3)

THORPE, M. (2002) Learner support: a new model for online teaching and learning. *Open Learning*

A Day in the Life of Open Learning

Alan Mandell and Lee Herman
Empire State College, State University of New York, US

If conventional and open learning continue to converge (Tait and Mills, 1999), how "open" will open learning remain? How accessible will universities really be to mature students in all the rich complexity of their curiosity and experience?

There are signs that university programs once carefully welcoming to older and under-served students are becoming more selective, even as their enrolments continue to grow. They are adopting policies driven by an industrial model of academic productivity and quality control, as well as by a highly politicized agenda of educational conservatism (Herman and Mandell, forthcoming). To be sure, adults will enroll, because they have to, in universities whose reach, thanks to technology, is literally global. However, we ask: How genuinely "open" will these learning communities be to a life of the mind, which is collaborative, democratic, and diverse?

We work as faculty in an alternative and relatively non-selective college of a state university in the United States. At Empire State College, faculty are officially called mentors. Our students, with whom we create single studies and entire individualized curricula, are working adults seeking university degrees.

Mentoring in our university makes sense because students are offered a learning environment that supports their demanding schedules, as well as their curiosity and purposes. For many of them, school was alien territory, an experience to endure. But they arrive at or return to university determined to finish and quite adept at juggling their intricate lives, while bobbing and weaving through the demands and rules of authorities. Thus, they are often taken aback when a mentor asks: "What do you want to learn?" "Why do you want to learn these things?" "How do you want to learn them?" "What do you believe you have already learned?" How do you decide that you have done so?"

These are mentoring questions. They do include what Mills has described as "the centrality of learner support" (Mills, 2003). But they go beyond such necessary supplements to the "academic program." These questions are at the heart of trying to create a faculty role that attends to and cares for the individual and for the richness of his/her learning.

In the following sections, we present a day and evening in our work as mentors. We try to cultivate lives of dialogue in conversations with our students and with each other. However, our work, like that of colleagues elsewhere, is shadowed by our worry that this nurturing learning environment is becoming more constricted. We wonder together, in a sample of our evening phone conversations, how we can sustain and even expand an open community of learning-a community we love.

Morning in New York City

Erin is at my door. She works as a teacher's aide in an after-school program for children under ten. She has heard them and her own son talk about the "bombing" of the World Trade Centre, which is only blocks away from their school. Erin has also heard that various teachers have tried to encourage their young students to talk about their feelings. What does one say? What does one not say? What will happen if, with the outbreak of war, these children, and for that matter, everyone, becomes frightened for their own safety? These are questions that Erin wants to answer. And I'm asking myself these questions as well. In addition, Erin worries that her own job is vulnerable. The school system, due to the recession, has already made large cuts in personnel and programs. Erin's decision to return to university was motivated by her practical need to secure a degree to protect her livelihood. And whipping through my mind are my still emerging responses to Erin's final essay and to her collection of articles on the debates regarding "post 9-11" curricula. Her portfolio is to be the topic of our discussion today.

"Did you look at my notebook?" Erin asks as she sits down at the table in my office. "It's all the articles that I have found and everything I've written on them."

"Yes, I did. I'm impressed with how much you gathered."

What has Erin actually learned? It's true; I *am* impressed with the variety of articles she has found. She has read the articles, searched the Web, spoken with teachers, and discovered worlds of experience of which she'd been unaware. For example, Erin was excited to learn about the lives of Afghan women. And she understood that it would be important for her students to learn about such things in order to appreciate the complexity of our world. Certainly, this is important learning that she has achieved. She has also learned to make informed selections about the material to include in her portfolio. But Erin's writings are weak, and, in particular, her final essay, while filled with information and her feelings of honest uncertainty, just does not pull things together. I'm also not sure that Erin really understands why the debate over "post 9-11" curricula is so contentious. What can I ask her? I want her to be able to tell me what she has really learned from her effort.

"I was interested, Erin, in the two curricula that you included in your materials. They seem to have very different emphases. What do you think about these differences?"

"One is about America. The other is about what's going on in the world," she eagerly replies.

"How does the first curriculum describe America? What topics does it cover? What attitudes are implied? I guess I'm asking you why you think this curriculum could be valuable?"

"All of this is about patriotism. This curriculum wants the kids to understand how special and important America is. It wants kids to find something to be proud of. That's its response to the fears they probably have."

Erin is starting to articulate an analysis. How much of my concern about her learning is a result of Erin's limited experience as a university-level writer? In our previous four face-to-face meetings, she came prepared to discuss what she had read. Erin often spoke enthusiastically about some part of her exploration: for instance, her interview with a fellow teacher worried about how the children's parents would respond to the curriculum he'd so carefully designed. I have to remember that while academic writing is important and enthusiasm isn't a sure sign of in-depth learning, Erin has engaged intellectually with the central issues of this study. Am I finding what she has learned?

> "Erin, do you remember the interview you did with the teacher who spoke to you about being nervous that his curriculum would upset the kids' parents, that they would argue that it wasn't patriotic enough?"
>
> "I was surprised about how nervous he actually was. In fact, it took me a while to understand why he thought that his effort to teach his young students at least something about Islam and the Middle East today was a possible problem at all."
>
> "Tell me why. What was the problem?"
>
> "All of us are incredibly ignorant about what's going on in the world. These kids don't know anything and, as I've found out in my reading, I didn't know very much either. Actually what this teacher did was a big effort on his part. He had to find and read a bunch of new things. He also had to figure out how to present an incredibly complicated situation to children. It was important for them at least to begin to understand."
>
> "But, Erin, why do think it is important for them to understand something about Islam, for example? And why would anyone object?"
>
> "Isn't this exactly what Svi Shapiro was saying in that article I wrote about? He wants us to see how weak our knowledge of the world is, and that it's dangerous now for Americans to have such a limited perspective. Even if we only care about defending ourselves, we have to understand how other people think of us. We're just blind if we don't. Our power doesn't help us that much; people might even hate us for it. We have to be able to try to get along with people who are different from us and we can only do that if we understand them."

I agree with what Erin has just said. In fact, I have to stop myself from just accepting the pleasure of her conclusions. So I ask myself: Does she understand why her assumptions are so vehemently challenged by, for example, the people who wrote the more "patriotic" curriculum. And then I ask her:

> "That's a good analysis. And, Erin, you should know that I agree with what you have said. But, can we also look at the other curriculum? If the author of that curriculum were here with us, what would he or she say about your conclusions?"
>
> "I see what you're getting at. I think it's a question of balance. The author of the second curriculum would tell me that the world is too complex for children to understand, and what they need, especially now, is something to be proud of. What

> do they know about *America*? Our values and ways of thinking are important too. And, right now, these children who live and go to school in New York City need to be able to identify with something stable, reliable and powerful. They need something that's good and also that can really protect them. From this point of view, now is not the time to confuse students with different ideals and attitudes. I'm sure the authors of this curriculum wouldn't say that a more global perspective is a bad thing. They are talking about educational responses that these kids and maybe all of us need now."

I'm seeing that Erin really is thinking carefully and critically about the information and topics she's been studying. There's no doubt that I still have to speak with her about the need for more practice as an academic writer. But I will also tell her that she has satisfied this learning contract and that I hope that she will take up some of the ideas and problems that emerged here in her future studies and in her work as a teacher's aide.

Erin and I quickly make another appointment and as she leaves, the receptionist calls to tell me that my next student is waiting.

Afternoon in Auburn

After the three students I'd seen that morning and a quick lunch, I check my email. There's a note from Melissa. I look out at the deep freeze and high snow of this winter in Auburn, rural upstate New York. Melissa lives here, but now she's stationed somewhere, probably warm and sunny, in the Persian Gulf, preparing to go to war. In civilian life, she's an "expediter," a delivery manager, for a freight transport company. In the military, she manages the reconstruction of infrastructure in war-torn areas: electricity and gas, sewage, potable water, phones, sites for clinics and housing and for food and clothing distribution. She's a veteran and knows how to prepare for devastation. She writes:

> "I am well. Unit morale is high. We know what to do. And I've had time to continue reading. But I have some questions. Why is Kutuzov always so sad? Also, has that evaluation come in yet for my experiential learning in integrated freight systems?"

Melissa has been reading *War and Peace*, an unintentionally perfect choice for these times and her immediate situation. Her advanced studies at the college have concentrated on business management, which supplements her work experience managing a large network of freight delivery. She's studied with many faculty here and her experiential learning is currently being evaluated for academic credit. Melissa likes to read. She told me that she had always wanted to read *War and Peace*. This big, complicated novel had long intimidated her, but she told me, "I want to prove to myself that I can read it." So we reserved some room in her curriculum for this intellectual challenge.

I began to think about Melissa's first question. Kutuzov is the commander of the Russian army during Napoleon's invasion. He is melancholy, obese, and an inattentive tactician; he loves his soldiers and his nation. Kutuzov is the opposite of Napoleon, whom Tolstoy portrays as a consummately rational but limitlessly ambitious leader. I guess that Melissa would find Kutuzov puzzling because he's so unmilitary and such a poor manager.

While wondering how to reply to her question, I also remember that I have to track down the evaluation she'd asked about. The evaluator is an adjunct faculty member, an expert on "just-in-time" schedule planning for freight delivery by ship, train and truck. But while she's

acknowledged Melissa's learning, she's been very slow to complete paperwork. I need to send her another request for the evaluation supposed to have been completed many weeks ago.

The phone rings. It is Anita, with whom I have been out of contact for some weeks. She had left a phone message two days before, but I haven't had the time to return her call. I ask her if I can get back to her in a minute. Then I quickly reply to Melissa's email:

> "Glad you are doing well. I'll track down that evaluation. Why do *you* think Kutuzov is sad? Stay safe."

I scrawl a note to remind myself to contact the evaluator, and then I call Anita.

Anita is enrolled in two Web courses, courses she chose because our office is quite a distance from her home and, as a single parent, her young children need her care. Actually, she has also begun to take real pleasure in the online conversations with people across New York State and even a few, a thousand miles away. And she likes the idea that she's taking a course by sitting at her computer. For a third study, she has been participating in a seminar I have been guiding on contemporary educational issues. She wanted, as she put it, to "come to school," at least periodically so that she could also talk with people in person. Her academic work has been eager but often late and weak, slowly improving but still just barely acceptable. The twelve students and I get together once a week at six p.m., but Anita has missed the last three meetings.

Anita is calling to explain that her absence is due to her mother's unexpected illness. She wants to finish. She knows she will be late. Aware of the importance of this call for her, I try to pay attention but I'm pressed for time. I tell her that I understand, and that, in comparison to what seem to be much more pressing priorities, she needn't worry now about handing in her journal and final two essays. I want to offer reassurance but I also know she will need all the flexibility our college has offered in order to succeed. She thanks me for the time extension. Then, in a spray of words, Anita tells me that she wants to keep working, that she has had email contact with the mentors on both of her Web courses, and that she only has a few assignments to complete in each study.

> "It helps me take my mind off my mother. I don't want to stop. I sit with my mother and that's what we both need. I read my assignments. I'm thinking of borrowing a laptop from a neighbour. I am a little late, but I'm getting things done."

I try to picture Anita sitting with her books in the hospital room, concerned about her children, watching her mother. "Then why don't you send me your essay next week," I somewhat hesitantly reply. "Good. Thank you. I will."

Will Anita manage to complete this essay? Will she really complete this study and her degree? I can't think about that now because I have to prepare for what I know will be a long conference call on the likelihood of the college moving to a system of letter grades for assignments and courses. I have to meet with several students and to secure tutors for others.

Early that evening, I am relieved to go home. But before I leave, I open my email one more time. I see another note from Melissa:

"I think Kutuzov is sad because war is sad; it's horrible and it's what people do when they haven't learned any better ideas. He knows that because of what he believes, and what Napoleon and the Czar believe, other people, who probably don't think much about power and glory at all, are going to follow them, suffer and die. I guess I'm here to clean up after "leaders" like them. What do you think? Oh, thanks for keeping after that evaluation. I want to graduate when I come back!
Gotta go. M."

Now I knew why, for all the busyness, this has been a very good day.

Evening on the Phone

About 9:30 p.m., our usual time, we call one another to talk and write together about mentoring. Sometimes, it is clear what our topic will be, but often, we are surprised. Always, the activities of our day flicker through our conversation, of which the following is a glimpse:

"I had a really interesting conversation with a student about the difficulties of talking with kids about 9/11." Then, after some details: "I couldn't easily figure out what Erin had learned, but when she and I talked carefully, I could see that she had some real insight. She could work precisely with what she'd found. Her writing was weak, but it will come along. Fortunately we don't yet have to grade these essays."

"I know what you mean. I spent a long time today on of those conference calls about the new grading policy. It's so exhilarating to have these dialogues with our students. Yet I think about these looming policy issues. I worry about what will happen to the freedom of our student meetings to focus on just developing the learning."

"I can't imagine how distorting it will be to grade each assignment. I can easily see Erin and me obsessing over the effect her slowly improving skills will have on her final course grade."

"How can we invite students to be real collaborators in their learning, if grades become a dominating political-economy of academic business? Won't students focus on the 'rewards' of grades and on our authority to dispense them?"

"Some colleagues claim that if we go to grades, we're giving students what they really wanted all along."

"Maybe so. But that assumes those same students would still be admitted to the college and allowed to remain. After all, isn't the move toward grading part of a much larger trend toward academic selectivity and so-called quality?"

"Applicants who come with poor school records wouldn't be allowed in. And the students who need time and support to learn well, won't make it."

"I've told you before about Anita. I talked with her again this afternoon. Her academic work is still very marginal; it progresses slowly and irregularly. Now her mother is ill. Anita needs more time for herself. She needs all the flexibility this college can offer, but I fear that someday that flexibility will no longer exist."

"It continues to strike me that how our whole approach to teaching and learning is at stake in any single aspect of our practice: whether it's how we and our students use time, or how we evaluate learning with them. It's all there."

"Speaking about evaluating, remember Melissa?"

"Yes, the freight manager/soldier who's now stationed in the Gulf and reading *War and Peace*."

"Well, I'm still chasing her experiential learning evaluator. But I wonder if these prior learning assessments will become much simpler but much more restricted."

"If the college starts recognizing only experiential learning that fits neatly into pre-set templates, like course analogs, the slow evaluator won't be a problem at all, because what Melissa knows simply may not count."

"But I had a good email exchange with Melissa today. She's thinking about so many things. You know what she wrote me? She said that Kutuzov is sad because war is sad, that people go to war when they haven't learned any better ideas."

"It's still astonishing to me that you and she are still in dialogue about Tolstoy. That she keeps making the connections."

"We have to figure out how to keep these paths of learning open. If we do, we'll be surprised by the beauty of what we and our students can discover."

References

HERMAN, L. AND MANDELL, A. (forthcoming, 2003) *From Teaching to Mentoring: Principles and Practice, Dialogue and Life in Adult Education* (London: Routledge).

MILLS, R. (2003) The centrality of learner support in Open and distance learning systems, in TAIT, A. and MILLS, R. (eds.), *Rethinking Learner Support in Distance Education: Change and Continuity in an International Context* (London: Routledge).

TAIT, A. AND MILLS, R. (1999) The convergence of distance and conventional education: patterns of flexibility for the individual learner, in TAIT, A. and MILLS, R. (eds.), *The Convergence of Distance and Conventional Education: Patterns of Flexibility for the Individual Learner (*London: Routledge*).*

The appropriateness of distance learning at higher education level for students aged 16-17

Elizabeth Manning
The Open University in the North, UK

Introduction

In 1974 The Open University (UK) began to admit students at the age of 18 rather than 21, a change evaluated by McIntosh and Woodley (1980). They came to the conclusion that that younger students are less likely to succeed with their studies and achieve a degree, a view more recently confirmed by Gardner (2000) and regular internal research. Now increasing numbers of 18 year-olds are joining the University, and steps are being taken to provide meaningful support to aid their - and other potentially vulnerable students' - retention. Since 1996, however, a Young Applicants in Schools Scheme (YASS) has been established in the OU, responding to governmental reforms in the 14-19 age group, specifically those concerning gifted youth. The Scheme involves students aged 16-17 taking a range of first-level courses with the University in Mathematics, Technology, Languages (French, German and Spanish), Science and Social Science, adding breadth, depth and enrichment to their school curriculum. These students, of whom there are now over 200, are very different from the 18-25 year-old cohort, who have left school, possibly with a negative experience, and view the OU as an alternative to traditional university.

This paper addresses a number of issues arising from this Scheme:

- is it just academically gifted young students who succeed with higher education level studies at a distance or are there other indicators of success?
- how do the pressures facing YASS students compare with those facing traditional OU students and how do they cope with those pressures?
- are there specific challenges for their tutors?
- how do YASS students fare with courses specifically designed for adults?
- what are the benefits to the students?

Its findings are based largely on discussions and interviews with a group of YASS students at Monkseaton Community High School in North-East England, in collaboration with whom the Scheme was first piloted, as well as the responses from a questionnaire sent to participating students throughout England. It is acknowledged that the questionnaires were probably completed by students who have successfully completed their course - or are likely to do so. A meeting was held with the tutors of the North-Eastern students, who were also invited to complete a questionnaire.

The students

Treating the 16-17 year-olds 'the same as any other OU student' has always been a feature of the Scheme. However, there are important differences. Unlike other undergraduate level students at the OU for whom there is open access, these young students, whose participation is voluntary, undergo a selection process through their school. They have the support of a

specific teacher who backs up the 'counselling' role of the tutor, providing reassurance and monitoring their progress. Moreover, they are in daily contact with their peers and are not working in isolation from other students.

Originally advertised as being appropriate for 'gifted' students, the Scheme has shown that academic ability is not the sole criterion for success. Not all students so far who have succeeded with their OU course have achieved - or go on to achieve - excellent results at school. The cohort of students interviewed for this paper all agreed that evidence of hard work, handing school work in on time, motivation and, particularly, interest in the subject and 'being smart' were just as important. Similar conclusions are drawn in a recent study in the USA, where 'high performance capability, high motivation and creativity' are cited as indicators of success for gifted students at university (Robinson, 1997, p.232). Students' personality, as demonstrated by McIntosh and Woodley (1980, p.78ff), and their attitudes to school work are also likely to influence their success with the OU. Few of those questioned admit to worrying about their studies, or about examinations in particular, indicating a level of confidence in their ability, which may not be evident in other new OU students, for whom the prospect of an examination after a long period and after a possibly bad experience can be especially daunting. It is evident that successful YASS students enjoy their studies at school, admitting to finding many of their lessons interesting. A substantial minority follow things up in their own time.

There is much concern at present in the UK about the pressures facing school students, both in the number of examinations they are required to take and in the expectation of high grades. Why should they want to add to their load by taking an OU course alongside up to five state examinations in the same year? For the vast majority it is to give them an advantage in applying to a traditional university, as they are able to demonstrate particular academic ability with relatively sophisticated study skills as well as evidence of working independently. For a minority, it provides a chance to study a course which is not available on the school curriculum. 71% of those questioned report that they are studying with the OU because of interest in the subject or to broaden their knowledge. There are therefore both extrinsic and intrinsic reasons for their decision to participate. Their motivation is high: 72% of those questioned thought it was 'very important' to complete their OU course.

Questions of maturity

Sir Walter Perry, the first Vice-Chancellor of the OU, wrote in 1976 that 'to follow such a course of study in isolation demanded qualities of maturity that would usually be lacking in people as young as 18' (quoted in McIntosh and Woodley, 1980, p.2). Whether 'isolation' is an inevitable factor in distance learning is beyond the scope of this paper. Nonetheless, as indicated above, these young students are not as isolated as many other OU students. But what does 'maturity' mean in this context, and it is necessarily linked with chronological age? One tutor in the YASS scheme defines it as 'an ability to plan and organise their time and material; to be a self-starter, be self-reliant, recognise their own strengths and weaknesses, identifying areas of improvement, working without their teacher's supervision or direction, knowing when to seek help'. How far are they able to develop these competencies in the school environment, where the approach is as much on teaching as on learning?

The management of time is the biggest challenge facing YASS students, but this is the case for most OU students. The workload is what they liked least about their OU studies, something confirmed in regular student feedback in the University. These teenagers

consider themselves to be at a disadvantage in this respect, compared to adult students: 'although they are working I don't think they have as much pressure as students to get their work done'. Many of them have part-time jobs, and not just at weekends. Yet the strategies they adopt to overcome the difficulties are impressive. The drawing up of a timetable and sticking to it is the most common solution, and several make a conscious effort to get ahead, anticipating difficult periods when they have to prepare for their school examinations which often take place in the middle of their OU course. There was an initial worry that they might slacken their effort during the school holidays, when there was no teacher to keep an eye on their progress. On the contrary, students make good use of these periods to catch up, even if 'postponing' their OU studies runs counter to the strict pacing of the course. On occasion, OU study takes second place to school work. In other words, these young students are following the advice appropriate to distance learning students generally: do what is 'good enough' in the circumstances, an unfamiliar concept when they are used to striving for good marks. This may mean studying in fewer hours than are recommended. Significantly the majority of these students have to resort to studying with the OU for less than five hours a week (even on a course where the recommended time is 12-15 hours a week), less than unconfident adults who tend, at least at the beginning of their studies, to take longer than the guidelines. Most study in the evenings and/or at weekends, not in spare time at school. The response of one student speaks for itself: 'I work as much as is physically possible (I'm not joking!)'.

Yet YASS students are not just having to juggle their OU studies with their school commitments. Young students can have personal problems as severe as those experienced by adults at a vulnerable, potentially unstable, time of their lives.

Approaches to learning

A surface approach to learning is likely to result from the extrinsic orientations to study. But their experience so far of learning and the emphasis on achieving good grades (the most important aim for these young students, especially for boys) must also be taken into account. Entwistle (1987, p.45) laments the 'failure of schools to encourage deep, reflective, adventurous and intuitive modes of thought'.

Tutors recognise the surface approach adopted in their courses, which, after all, are designed for adults: 'the activities and assignments tend to be seen as "tasks" by sixth formers'; 'I think the students' approach is probably similar to their approach to A level'. A Mathematics tutor, with experience as a school teacher, comments in detail: '[Assignments] are often completed without reference to units if they know the topic. Material is often seen as a way of answering the [assignment] rather than the "teaching" to replace a lesson.... They see it as a course to get through rather than active learning.' The reaction of one student to the first part of her (Social Science) course suggests a reluctance to engage with the course concepts, the different approach and discourse. 'I expected it to be interesting/stimulating. It's basic knowledge. This is all facts and figures. It's less about enjoyment, more about the knowledge. It's not very exciting. It's boring – just figures. We like human interest stories. In school you get human interest stories first, then the theory. In the OU the theory comes first.' This reaction maybe confirms why the Social Sciences course has only recently been made available to them. Courses in the Arts and Humanities are still not on offer.

Mathematics, Science and, to some extent, Languages involve 'facts and internal logic' (Entwistle, p 60) rather than personal experience. McIntosh and Woodley also noted (1980, p.120) that 'younger students fared best in Maths courses where their performance matched that of older students. However, they fared relatively badly in other faculties, there poor performance being most marked in the area of social science.' Their evaluation also noted that 12% of younger students found their course 'not very' or 'not at all' interesting (ibid, p.194).

More work needs to be done to find out how these young students respond to tutor feedback and whether it differs from the responses of adult students. Certainly they are used to more immediate feedback and reinforcement at school, although the nature of both is likely to be different from what they receive from the OU. Gibbs and Simpson (2003) have noted that what students generally do with feedback 'makes depressing reading'. While the majority of YASS students say that they read the feedback immediately, it is principally to act on the advice given to benefit the next assignment, the inference being to achieve higher marks. However, there is evidence that they are pleased to have developed learning skills which have benefited their school studies. Writing skills have particularly improved, and one student commented that her school history essays are now half the length they used to be.

Taking account of their time pressures, it would appear that young students are at least as adept as adults in adopting a strategic approach to their studies. Indeed the majority of young students feel they have an advantage over their adult counterparts, not just because they may recently have studied the subject at school but because 'I am at school, in an everyday learning frame of mind. My life is built around learning, so the OU course works simply as an extension task'. One language student has tried making use of 'low-grade' time as recommended in her study guide; others consciously select which exercises they do, 'choosing what I really need to do'.

The proportion of students who are interested in the subject and who are doing it to broaden their knowledge suggests a deeper approach to learning. The majority, contrary, perhaps, to the perceptions of their tutor, say they work through the course materials methodically rather than being task-orientated - a group on the Social Sciences course going to the school library to find out more about Marx - and over half relish the opportunity to relate new concepts to real life situations, enjoying the opportunity to make links within and without the course. They themselves feel disadvantaged (a view shared by several tutors) in not having the same life experiences as adult students to draw upon.

Coping with the academic demands of the course

Generally students feel – and their tutors agree - that they can cope with the academic demands of their course. 69% of those questioned found their OU studies 'easy'. Their continuous assessment grades confirm this (scores in Mathematics not infrequently being at distinction level). This gives rise to anxiety in some parts of the University. What does this say about standards? Are we offering courses at degree level or not? However, the mission of the OU has always been to attract students who, for whatever reason, have not experienced university-level study before. Hence these first level courses on offer take account of their lack of experience and/or subject knowledge. It is here that the young students feel they have the advantage.

It is not suggested that all YASS students complete their course successfully. Of the 2002 cohort of 163 students, 54% passed, of whom 15% gained a distinction; 7% were offered a resit/resubmission, while the remaining 40% either failed or, more likely, did not complete the course. This is why the selection process is so important because lack of success is unlikely to be caused by a lack of academic ability. Motivation and commitment need somehow to be accurately forecast.

Working with adults

The only aspect of the Scheme which suggests a relative lack of maturity on the part of YASS students concerns their relationship with adults, both with their fellow students, but more particularly with their tutor. Attendance at tutorials is, at best, irregular: 'I've only been to one tutorial. I've either been working or on holiday, or have so much work to do'. (Is this not the case for the majority of students with their increasingly busy lives?). They seem not to understand the role of tutorials, believing they only need to go if they get stuck. A group on one course tried to set up a rota system of attendance. It is clear that they have found the experience daunting, partly at the outset having to find the venue on their own and meet a group of adults they did not know, but this must be no different for the unconfident adult who has made a much bigger decision to join the University. However, the experience has been beneficial: 'I have gained experience from working with older people. I am more confident.'

Their presence at tutorials, especially where they represent a significant proportion of the group as a whole, also presents probably the biggest challenge to the tutor as far as this Scheme is concerned. They frequently have less to contribute to the discussion, again possibly because of their limited life experience. 'They tend to perform tasks [in German] more mechanically and don't look to exploit the full potential of an interactive task as adults do' or, if the subject is familiar to them, as in the case of Mathematics, they 'think and understand faster and can become intolerant of adults who may think more slowly'. Their tutor in this case has noted their body language which conveys an element of condescension and which can be off putting to an adult who has not studied for a long time and who is lacking in confidence. Robinson (1997, p.227) notes the boredom, expressed 'both directly and indirectly, with a class that is moving too slowly for them'. However, it is the studying alongside adults which is considered to be an important part of the scheme, and it can be a positive experience from both sides. The young students comment on the friendliness and helpfulness of their adult counterparts and the tutors generally welcome their freshness and the different perspectives they bring.

The relationship between student and tutor is discussed as part of the induction programme, and they - like all students - are encouraged to view their tutor as a 'buddy'. Very few seem to do so, acknowledging that they regard their tutor as they do their teachers at school, or as a 'respected friend'. It is not easy for them to address them by their first name, and a few admit to avoiding using their name at all. This suggests a barrier in establishing a facilitative dialogue. Significantly, those students taking online courses feel most at ease with their tutor and fellow students and have less of a problem in calling their tutor by his or her first name.

Only the minority overall have telephoned their tutor, saying that they have not had the need to do so. Maybe it is because they are diffident. The tutors themselves confirm that they have less contact with their young students compared to the rest of their group. McIntosh and

Woodley (1980, p.96) noted that 'younger students were less likely to mention academic and learning problems than older students', a view shared by the tutors. Significantly, however, they seem to be less diffident in articulating them to their school coordinator - someone they know well - at their regular review meeting. The assignment, of which there may only three in the year, is the principal way in which a tutor can assess the understanding of his or her students. Very different from the school environment.

Experience of distance learning

What is it that these young students find different about studying at a distance compared to their study at school? Their views may illuminate the challenges facing older students, particularly those vulnerable ones who left school with few qualifications and who do not have the confidence of these young people who, after all, have been selected to take degree level study early. Interestingly they express their opinions positively apart from the, perhaps inevitable, comment from a few about the lack of personal interaction - a view endorsed by one tutor who feels that young people need more peer group interaction than adults – and the less immediate help available. On the other hand, they still have their school life to support them and one or two students admitted to asking their teacher at school if they were stuck with an aspect of their OU course.

There is an apparent conflict between the unanimous concerns about workload and need to manage time effectively and the view expressed by quite a number that there is less pressure in studying at a distance. If this means that they are not used to meeting fewer, distant deadlines, it could also confirm again a task-focused approach rather than the sustained learning from the course materials. They welcome the student-centred, flexible approach demanding greater responsibility for their own learning and less input from teachers: 'we have to have full concentration on what we're doing as there is nobody to tell us what to do'. The result can be 'selective negligence' (Gibbs, 2003, p.16): 'You can get away with not doing a lot of the work – this is not always a good thing'. On the other hand, 'I am in full control of what I work on with this course, so I have learned to identify my own weaknesses and work on them myself'.

Would these young students still do the course again if they knew what was involved? 78% of those who volunteered an answer replied in the positive, the rest all citing the conflict between their OU studies and school work as the reason for saying no. 'Having found it incredibly stressful trying to keep up with doing well at school and completing [assignments] on time, I don't think I would have registered if I was aware of this. However, I have found it very interesting so far and would still consider registering for it if I had less work.' This conflict was what the majority liked least about the experience, coupled with the amount of reading involved and having to cope with the amount of material that came through the letter box, a common complaint among students generally. Significantly, however, several could not think of anything negative to report on their experiences. On the contrary, they were keen to comment on the positive aspects; they welcomed the wide range of subjects covered in their courses, the opportunity to learn about something new, broadening their horizons, and developing skills.

YASS meets the government agenda for schools and has been welcomed by schools: 'this is just what we are looking for'. For the right student it has been shown to be a rewarding experience. There is little doubt that 16-17 year-olds have the maturity to succeed with degree level study at a distance, and it could be said that their experiences and barriers facing

them shed fresh light on the needs of the more traditional student. They are not so different after all.

References

ALLEN, B (1996) Open mathematics evaluation report, Monkseaton Community High School, internal document.

COLE, P. (2002) Age mixing in FE colleges: does it help or hinder learners? *Journal of Access and Credit Studies* 4(1), pp 42-50

DEPARTMENT FOR EDUCATION AND SKILLS (2002) 14-19 Opportunity and Excellence (London, DfES)

DEPARTMENT FOR EDUCATION AND SKILLS (2003) 14-19 Extending opportunities, raising standards (London, DfES)

ENTWISTLE, N. (1987) *Understanding classroom learning* (London, Hodder and Stoughton)

EVANS, T. (1994) *Understanding learners in open and distant education* (London, Kogan Page)

GARDNER, J. (2000), Young students in distance higher education – does it work for them? (MA thesis, Oxford Brookes University)

GIBBS, G. (2003) Open University in the North regional staff development conference, *Motivating Students,* Durham 2002 (internal publication)

GIBBS, G. & SIMPSON, C. (as yet unpublished) Does your assessment support your students' learning?

RAY, S.I. (2002) An interview with Abraham J. Tannenbaum *Roeper Review* 24(4), pp. 186-191

ROBINSON, N.M. (1997) The role of universities and colleges in educating gifted undergraduates *Peabody Journal of Education* 72 (3&4), pp. 217-236

WOODLEY, A & MCINTOSH, N (1980) *The door stood open: an evaluation of the Open University younger students pilot scheme* (Sussex, The Falmer Press)

Distance education for teacher education reform

Juan Melendez
Distance Education Institute, University of Puerto Rico

Background

The reasons for creating the Puerto Rico Virtual School Project are similar to many other virtual schools. Of the five basic reasons mentioned by Dade (2003), four were applicable to the Project:

1. Prepare 21st century students for fluent use of interactive media in knowledge-based workplaces;
2. Provide access to courses not available locally, as well as to remote archives and distant experts;
3. Using teaching strategies that build on the learning styles of kids growing up in a media-intensive world; and
4. Involving excellent instructors attracted by the opportunity both to offer courses they otherwise could not teach and to employ pedagogical strategies difficult to use in traditional classroom settings.

The fifth reason, "delivering instructional offerings at lower costs with reduced administrative overhead", was not an issue that was raised in the planning process, but nonetheless is an issue that cannot be ignored.

The Beginning

A big concern in the Puerto Rico Department of Education was the role and appropriate use of educational technology in the curriculum. While many projects were created, experimented with and carried out for years, few of these were able to be classified as successful. The failure of many of these projects could be attributed to violations of the principles of the change process.

Hall & Hord (2001) record 12 principles that are the results of their long-term research with innovation and change in schools. These principles are:

1. Change is a process, not an event
2. There are significant differences between the development and the implementation of an innovation
3. An organisation does not change until the individuals within it change
4. Innovations come in different sizes
5. Interventions are the actions and events that are key to the success of the change process
6. Although both top-down and bottom-up change can work, a horizontal perspective is best
7. Administrator leadership is essential to a long-term change process
8. Mandates can work
9. The school is the primary unit of change

10. Facilitating change is a team effort
11. Appropriate interventions reduce the challenges of change.
12. The context of the school influences the change process.

Taking into consideration Hall & Hord's principles, a review of many of Puerto Rico's technology projects demonstrated that they failed to take into consideration the slowness of the change process. The shortness of the project life spans never permitted a big impact on the teachers nor the schools.

Concerning this point, John Chambers the CEO of Cisco revealed the particular slowness of change. His researchers documented the investments that companies had made on information technology over a nine year period. They discovered that the companies were more productive in the later years (seven to nine) than the middle years (four to six), while these middle years were more productive than the first three years (Foley, 2002).

For this reason, the development and establishment of the Virtual School, using teachers with full-time commitments in their regular schools, and being trained part-time to produce on a part-time basis, had to be a slow process. This situation justified the rationale for it to be originally envisioned as a five year project - three years of training and production, one year of testing and one year of refinement. However, because of political reasons - the elected period of the government ended in two years, the funding by the Department (Ministry) of Education was limited to two years. Also, the fear of establishing a new type of school with an unprecedented administrative structure in Puerto Rico, limited this two year development period as a purely training stage with no written mention of the Virtual School as an end product.

This forced the project to be divided into two periods: the preliminary two year training period and the formal three year establishment period. This latter three year development period has three sponsorship options: The Department (Ministry) of Education as the sole sponsor; the University of Puerto Rico as the sole sponsor, or both - in a combined effort.

Recruitment

Empirical studies have shown that the success or failure of an educational technology project –such as a virtual school- can be forecasted when the participants are diagnosed in terms of disposition, entry skills and access to technology tools (Christensen, Griffin, & Knezek, 2001; Guha, 2001; Hurley & Vosburg, 1997).

Concerning the entry skills, the Project differentiated computer literacy skills in an educational setting from computer integration skills. In the first set of skills, a teacher may have the neuromuscular and mental schemas to run computer programs, but not know how to help students learn with a computer, that is considered the essence of the second set of skills - integration. For recruitment purposes, teachers with computer integration skills had a first priority and teachers with literacy skills and a disposition to learn integration skills had a second priority. However, the project wanted to avoid teachers without computer literacy skills but with a disposition to learn them. This group of teachers needed a program with a series of resources that the Project would not provide.

For this reason, the Project limited its recruitment efforts to two main channels: 1) personal referrals by teachers and professors who had concrete experience with Internet savvy

teachers, and 2) advertisements in the WWW. Concerning the advertisements, the rationale is fairly simple; if the Project advertises in the printed media, teachers who are not active computer and Internet savvy are more easily informed of the Project and may apply in greater numbers. By limiting recruitment announcements to the WWW, in educational and informational Puerto Rican sites, the possibilities of enquiries from active computer and Internet users was hoped to increase.

According to the instructions provided, the teacher enquiries concerning the Project were sent solely to an email address. The enquiries were quickly replied to by Project personnel, with an attached questionnaire. The questionnaire was required to be answered, as an attachment, within one week. Once the questionnaire was properly received, another email was sent with the actual application as an attachment. Again, the application was to be returned within one week. This procedure was done to assure that only active email users were sending in the application. The instructions on the questionnaire and on the application stressed that the selected participants would be asked to document their answers –as a measure to increase the validity of the responses and information being provided by the teachers.

Each applicant record was tallied according to a checklist that was developed. The criteria of the checklist were: years of experience using the Internet, years of experience using email, experience creating online curriculum, experience creating face-to-face curriculum, experience creating online instructional materials, experience creating traditional instructional materials, experiences with online learning as a teacher, experiences with online learning as a student, experience with Blackboard or other online learning platforms as a teacher, experience with Blackboard or other online learning platforms as a student, experiences with Problem Based Learning as a teacher, experiences with Problem Based Learning as a student, having a personal email account, having a computer at home, having an Internet connection at home, days per week on the Internet, hours per day on the Internet, ability to read English (because some of the instructional materials used in the training were in that language), experience in participating in forums and discussion groups, experience in participating in private chats and group chats, etc.

The applicants with the highest scores were given a preliminary acceptance to the Project. These tentative participants were then asked to document their answers, according to the checklist. Those who made serious attempts to document their answers were interviewed, via chat and email exchange until they were finally accepted.

The Project Design

Taking into account the predictors mentioned previously, studies by Mahmood & Hirt (1992) and Byrom & Bingham (2001) coincide in citing three additional factors that have a significant influence on the success of technology projects in education:

1. administrative support
2. the existence of an effective training program
3. the existence of a technology plan

Byrom & Bingham offered four additional factors necessary for success that are pertinent to the project

1. planning for a process that is slow

2. planning for a transformation in the teaching process to accommodate the use of technology
3. the provisions for fast and effective support
4. the creation of an effective assessment that provides on only summative information, but can also provide complete formative information

Concerning administrative support, the Project is a product of the College of Education's Preparing Tomorrow's Teachers to Use Technology (PT3) Grant which has bolstered the University's technological infrastructure and know-how on ways to better integrate technology into its curriculum. It was one of the Project's leaders that originally submitted a proposal to the Puerto Rico Department (Ministry) of Education as a means to continue the technological development of the College, while meeting a real need in the Department (Ministry). However, internal struggles within the Department (Ministry) for control of the Project delayed signing the contract with the University. In general terms, this coordination between two of Puerto Rico's largest educational agencies has assured top administration support for the Project, though their combined bureaucracies present huge obstacles.

Concerning the technology planning, one of the biggest obstacles confronted by the Virtual School in the beginning was the ever-changing plan. On the one hand, the Department (Ministry) wanted to experiment with an open source learning platform, while the College of Education wanted to use the learning platform it was using (Blackboard) to facilitate the professor's involvement. On the other hand, the slowness in preparing the College's computer facilities for the training caused considerable training delays.

The Essence of the Project

Sun (2000) and Breithaupt (2000) have stated that the effective use of a technology intensive education requires serious planning for the reconceptualization and transformation of the teachers' instructional practice, because it is difficult, slow and requires a new educational paradigm. Because of this, one of the key elements of the Project design is the use of PBL (Problem Based Learning) as the principle curriculum methodology. It was decided that the Virtual School would have a focused PBL curriculum because of past failures of the Department (Ministry) with constructivist approaches that declared constructivism as its philosophy and methodology but whose actual practice was really the opposite. The essence of the Project is that the new technology paradigm being constructed, because of the totally virtual nature of the school, will facilitate the real incorporation of constructivism through the PBL methodology. In other words, the virtual nature of the Project will serve to interrupt the traditional objectivist/teacher centred paradigm for an innovative constructivist/student centred one.

While this sounded feasible, the next concrete question was: how are the teachers expected to master the skills and concepts necessary to integrate PBL into their teaching in a new virtual environment? Heinich, Molenda, Russell & Smaldino (2002), McRae (2001), and Wetzel (2001) only confirm common sense: 1) the need for effective models, and 2) effective practice. These principles are being followed by practising virtual communications from the recruitment process to training to the handling of administrative tasks.

This policy of continuously practising virtual communications has been very important to the Project from the beginning. It recognises the importance of developing a desirable "institutional culture" which can make or break any organisation –including the Virtual

School. To validate the point, Marcinkiewicz (1996) found a correlation between the use of the computers among new teachers and the existence of a technology environment that motivates. In summary, the study found that new teachers, with computer skills, used their skills in technologically motivating environments, while abandoning the use of the computer in poorly motivating technological environments. A technologically motivating environment was defined as place where the colleagues use and appreciate the integration of computers in the curriculum. This study implied that if the Virtual School were to practice a new paradigm, it had to create and institutionalize the culture it wanted for its teachers. The difficulty of this can be appreciated when it understood that the Puerto Rico School system was created by the United States Army after the Invasion of 1898. Its purpose was to control and domesticate the Puerto Rican population (Torres González, 2002). This administrative structure is still basically in place today in the Department (Ministry) and in the University.

The challenge of the Virtual School is to help teachers to break this paradigm of control, and to create a new one based on teacher empowerment. In order to accomplish this, the route towards the creation a virtual curriculum is seen as a creative process which implies the design of an appropriate strategy that promotes innovation. This is why an environment such as this must be created to foment experimentation and the tolerance of errors (Jeffrey Govendo in Moore, 2001). This environment must balance privacy while fomenting a high level of dialogue among colleagues, and must give public praise to innovation (Solomon, 2001).

Because change is such a complex process, it is necessary to take into consideration the advice of Labovitz & Rosansky (1997) concerning alignment. They suggest that it is necessary to remain focused on the main goal or the principle objective of the organisation. Once that is clear, it is necessary to develop the knowledge, skills and attitudes of all the participant teachers and staff in order to reach the main goal or the principle objective. For this to be done effectively, the proper technological strategies must be developed and aligned with the learning process of the student population. The Virtual School is presently in this process of alignment.

References

BREITHAUPT, D. L. (2000). *Educational technology plans: Keys for successful implementation and accountability*. ERIC No. ED444576.

BYROM, E. & BINGHAM, M. (2001). *Factors influencing the effective use of technology for teaching and learning. 2nd ed.* Durham, NC: SIER*TEC.

CHRISTENSEN, R.; GRIFFIN, D. & KNEZEK, G. (2001). *Measures of teacher stages of technology integration and their correlates with student achievement.* ERIC No. ED451187.

DADE, C. (2003). Forward. In Zucker, A. & Kozma, R. *The virtual school: teaching generation V.* p vii-xi. New York: Teachers College Press.

FOLEY, J. (August 5, 2002) What's next: productivity revisited. *Informationweek*, 36.

GUHA, S. (2001). Integrating computers in elementary grade classroom instruction-analyses of teachers' perceptions in present and preferred situations. *Journal of Educational Computing Research*, 24(3): 275-303.

HALL, G. E. & HORD, S. M. (2001). *Implementing Change: Patterns, Principles, and Potholes*. Boston: Allyn & Bacon.

HEINICH, R. MOLENDA, M. RUSSELL, J. D. & SMALDINO, S. E. (2002). *Instructional media and technologies for learning*. Seventh ed. Upper Saddle River, NJ: Merrill; Prentice Hall.

HURLEY, N. P.& VOSBURG, J. D. (1997). *Modern technology: the relationship between student attitudes toward technology and their attitudes toward learning using modern technology in an everyday setting*. ERIC No. ED415841.

LABOVITZ, G & ROSANSKY, V. (1997). *The Power of alignment: how great companies stay centred and accomplish extraordinary things*. NY: John Wiley & Sons.

MAHMOOD, M. A.& HIRT, S. A. (1992). *Evaluating a technology integration causal model for the K-12 public school curriculum: a LISREL analysis*. ERIC No. ED346847.

MARCINKIEWICZ, H. R. (1996). *Motivation and teachers' computer use*. ERIC No. ED397818.

MCRAE, P. (2001). *Increasing the integration of technology into the fourth-grade curriculum using teacher/media specialist collaboration in planning student research activities*. ERIC No. ED456831.

MOORE. M. M. (August 1, 2001). [Interview with] Jeffrey Govendo. *CIO*, 116.

SUN, J. (2000). *Planning into practice: resources for planning, implementing and integrating instructional technology*. Durham, NC: SIER*TEC.

TORRES GONZÁLEZ, R. (2002). *Idioma, bilingüismo y nacionalidad: la presencia del inglés en Puerto Rico*. San Juan: Editorial de la Universidad de Puerto Rico.

WETZEL, D. R. (2001). *A model for pedagogical and curricula transformation for the integration of technology in middle school science*. ERIC No. ED458129.

'Mastering' Communities of Practice across Cultures and National Borders

Dr. Daithí Ó Murchú
Trinity College, Dublin, Ireland

Dr. Elsebeth Korsgaard Sorensen
Aalborg University, Denmark

Introduction

The enhancement of quality in educational offerings of networked collaborative learning on the Web appears a broad, complex and multi-faced challenge (Cecez-Kecmanovic & Webb, 2000). Among other things, the challenge identifies as key components pertinent to quality and success, the design of the virtual learning environment and the implied roles enacted by teachers and students throughout the delivery process (Koschmann, 1996; Collis, 1997; Bates, 1999; Harasim, 1999; Collins, Mulholland and Watt, 2001). To design collaborative processes that truly integrate and draw upon individual competencies and interests of the adult student appears an even more challenging activity (Danielson, Lockee & Burton, 2000; Woodruff, 2002; Sorensen, 2002; 2003a).

It is evident to the authors that the building of theory within the literature on design of networked collaborative learning is rather scarce and dominated by mainly empirical studies. As a result, many design approaches rest on mainly pragmatic perspectives derived as lessons from practical studies. The ideal approach, however, must be to merge the two, theoretical knowledge and lessons from experience, in order to establish the bridge for knowledge building on design of networked learning. Web-based learning environments (WBLEs) are clearly the contemporary, instructional "innovation of choice" in higher education (Persichette, 2000).

This paper reports on the study of two online courses from two different Masters programmes, in Ireland (MEd. & MA in Education, MIC) and in Denmark (MS in ICT and Learning, OL). Both the courses and programs in question have been designed and delivered by the authors on the basis of their national and cultural organisational, pedagogical, and technological traditions and preferences, utilising a combined theoretical (Wenger, 1998) and pragmatic optic. Our main objective at this initial stage of the research is to quantitatively measure and investigate the quality of the two courses (as outlined at a later stage in the paper), to the extent to which it is possible to identify the establishment of 'Communities of Practice' (COPs), in "mutual learning".

Theory on Learning Perspective: Online Communities of Practice

The concept of learning through communities of practice is presented and developed by Etienne Wenger in his book "Communities of Practice. Learning, Meaning, and Identity" (1998). The book presents a social theory of learning. The primary focus of Wenger's theory is the view of learning as social participation as a process of being active participants in the practices of social communities and constructing identities in relation to these communities. Wenger defines a community as "a way of talking about the social configurations in which

our enterprises are defined as worthwhile pursuing and our participation is recognizable as competence" (Wenger 1998, p. 4). In Wenger's perspective, a social theory of learning must necessarily encompass the elements that denote or characterize social participation as a process of learning. The four main "entities" in Wenger's position in relation to his social theory of learning are *meaning, practice, community, and identity* (Wenger, 1998, p. 5). To Wenger, learning takes place through engagement in actions and interactions, through which it reproduces and transforms the social structure in which it is situated, and while it is viewed to be the carrier of the evolution of practices and the absorption of newcomers, it is thought to also be the carrier of the development and transformation of identities.

Wenger's theory of learning is truly and fundamentally social. He sees COPs as "the social fabric of learning" (Wenger, 1998, pp. 251) and stresses that the mechanism that makes information knowledge empowering (i.e. the very mechanism that makes it "knowledge") is the way and the extent to which it can be integrated and operationalised within an identity of participation.

Collaborative learning principles call for a perspective and functioning of group learning, while learning through COPs points to learning as an aspect of the functioning of a community of practice. They both emphasise learning as *an individual and a social phenomenon*, and they both argue for shared, collaborative and democratic learning efforts, stimulated through *participation, engagement, motivation, and ownership* (Sorensen, 2003a). In the learning perspective applied to the present study, we view online learning as processes taking place *collaboratively* in what we identify, in principle, as *online communities of practice*. It changes our analytical focus from viewing the COPs as secondary phenomena in a fixed instructional plan, to emphasizing the COPs themselves as the curriculum.

Descriptions of the Master Programmes

Denmark: Course on "Online Learning" (OL)

The course on "Online Learning" (OL) is one of several courses on the Danish cross-institutional online MS in ICT and Learning (MIL). MIL is a two-year (half-time) Master education in ICT and Learning. MIL provides continuing education for working adults engaged in educational planning and integration of ICT in learning processes at schools and all types of educational institutions. Employees with educational responsibilities in different types of organisations also enter the program. MIL is structured in four categories of studies: four modules (each consisting of three to four courses), one project work, and one Master thesis. Many of the approximately 40 MIL participants were highly qualified teachers at the high school level. They have extensive university education and high competence within their individual work areas.

The design of the OL course was based on PANEL, a process oriented model for design of participation in collaborative knowledge building processes on the net (Sorensen, 2003a). The main pedagogical idea assumed in the model is the establishment of a student-centred, open process in which knowledge resources enter dynamically from outside via the participants as well as through the teacher(s). This process should be driven and motivated by the participants and their individual knowledge (the latter is an important factor in adult education, where each of the participants is an "expert" in their individual working context). It also assumes a dynamic interchange between teacher and learner roles and provides a rough indication of how much of the teacher contribution evolves at a meta-communicative

level. The participants, in the two-week preparation period, read literature according to three themes within the course subject, online learning. The themes corresponded to the names of the three discussion for a in the succeeding period of discussion.

The OL course lasted 5 weeks. It was divided into periods of reading and preparation (two weeks) and debate (3 weeks). The participants were asked to distribute a set of roles among the members of their online group (on average consisting of 4 participants). The roles were supposed to form, support and guide their later discussion and to give the participants a concrete point of departure in the discussion. Some were presenters, some were moderators, etc. The description of the roles was clarified in the assignment. Both teacher and students agreed to commit themselves to attending the virtual learning space for a minimum of five times a week over the three weeks of debate. In the debate period, each of the groups was asked to present a commonly agreed problem related to the literature. Moreover, they were asked to initiate, conduct and wrap up the succeeding online plenum discussion, which evolved from the problem identified by their group. In parallel with the discussions, the participants and the teacher were engaged in meta-reflections and meta-communication in a meta-forum, to reflect and discuss the experiences and processes of the participants, as they evolved.

Ireland: Course on Qualitative Research Methodologies and online Learning possibilities (MIC)

This Master course (MEd. & MA in Education) is a two-year taught programme which is comprised of working adults from various walks-of-life in education (Elementary, Secondary and Third Level), adult education, private sector and business. Similar to MIL, Denmark, the Master programme is structured in four categories of studies: four modules (each consisting of three to four courses), one project work, and one Master thesis. The majority of participants (56%) were practicing teachers or involved in Education management (18.6%). The remainder hailed from administrative or private business and general education (25.4%). They had extensive university education and high competence within their individual work areas. Having firstly completed a preliminary Diploma, at the University, and submitted a 'project' on a topic of their own choosing, the participants were deemed eligible to further their studies to Masters level in the second year by attaining a recognised *'honours'* standard in their work.

The participants' Diplomas varied from ICT (Information Communication Technologies) and Adult Education to General Education. Their second year introduced them to the various aspects of research methodologies (both qualitative and quantitative), and the process of thesis preparation and writing. During this second year, they were expected to submit a final thesis outline and choose a supervisor (if they so desired otherwise one was automatically provided by MIC). It was with specific reference to the course on Qualitative Research Methodologies, the collaborative interaction between the teacher, the students and the demands of modern day living that the idea, development and realization of the online environment evolved. Traditionally, the Master course was 100% face-to-face instruction but in 2002-2003, the teacher decided to experiment by expanding the online and virtual, web-based possibilities of his own involvement on the course with the agreement of the participants who were also expected by the University to sit a written examination at the end of this section of the course.

Based on similar principles and ideologies to PANEL, a process oriented model for design of participation in collaborative knowledge building processes on the net (Sorensen, 2003a), the online course at MIC was initially created and designed out of a mutually agreed need to find a more practical, and stream-lined mode of delivery of the course, over 5 weeks,(and thereafter), to the many students who had to travel long distances to the University. Its evolution was student-driven, collaborative, open-ended and non-regulated to encourage full participation at all levels of students' online experience. The possible uses of, and access to the forum were openly discussed in the face-to-face meetings at the University and the rest was left to the natural laws of progression or regression depending on the students themselves, their discussions, needs and desire to openly communicate and share knowledge and ideas in an online forum (OLF).

Methodology

At this early and tentative stage of our research into the myriad of possible effects of the online learning courses outlined on web-based learning and teaching technologies, and on students' perspectives towards the formation of Communities of Practice (COPs), we adopted a qualitative, electronic response questionnaire, which was distributed by email to all participants. The questionnaire was formed and constructed from a Wengerian learning perspective emphasizing the three components of *engagement, imagination* and *alignment* as the main infrastructures of design (Wenger, 1998). The questionnaire is structured in 3 overall sections, obtaining respectively 1) information on the participant's age and sex, 2) information on the type of professional work of the participant, and 3) information on the participant's experience with the course.

Findings

The initial findings are based on the electronic responses to the questionnaire (Appendix A), from 91 students (41 male and 50 female) in both Ireland and Denmark. All respondents (100%) indicated that the online learning courses lived up to their expectations, and many of the positive affirmations given in question eight affirmed this:

> Student A: "The online learning course opened up so many possibilities...."
> Student B: "I learned a lot – personal as much as professional. I was quite excited...."
> Student C: "The use of the online forum made things so much easier for us to communicate..."
> Student D: "It was the best course on the Master programme as we had so much to do with it ourselves..."

Following on from their positive responses, the participants were requested to choose, at random, from a list of 18 prescribed and open-ended statements indicating the effect and quality, (or lack of same), of the courses as perceived by themselves, as individuals, and as members of a bigger 'Master's Community'. Because we deliberately confined the statements at this stage of the research to a myriad of points intrinsically associated with COPs, we wished to openly, in an un-biased fashion, assess whether or not some, or indeed any of these statements:

- were affirmed or ignored as a direct result of the participants' reflection on, and experiences of the online learning courses.
- were specific 'statements', which were more or less prevalent than others.

- suggested an element of cultural diversity in the participants' expectations to the online learning process.

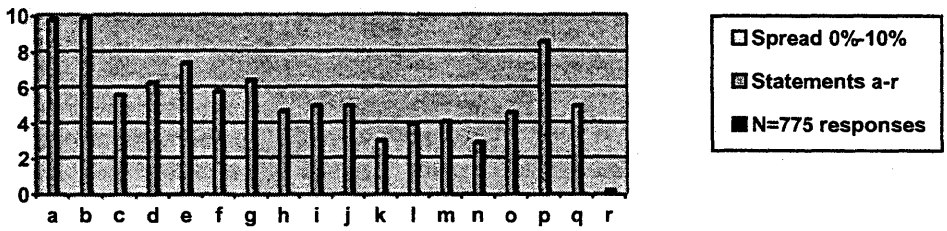
Firstly, the spread of choice over the 18 prescribed statements and the 775 responses in question 5, ranged from the least popular (n, k, m, o, h, ranging between 3% - 5%), to the most popular (b, a, p, ranging between 8.6% - 9.8%). It became obvious to us as we assessed the spread of responses, that the students perceived all statements to have played a part in the online learning courses, thus affirming the existence of the main tenants of COP's in both courses, as outlined in our questionnaire. As response 'r' was open-ended, only 0.2% of the respondents opted to add an 'extra' point to the list which stated:

Student E : "That the online learning course was an example of best-practice within itself".

See Table 1 for a more comprehensive breakdown of the spread of responses:

Table 1

Responses to Questionnaire



It is also noteworthy that there were 327 responses from the male participants and 448 from the females, and whereas the males choose statements a, b, p and g as their first choices, the females choose statements b, a, p and d in order of preference. The least popular statement among the males, apart from point r, was statement 'j' whilst among females it was statement 'n'. We agree, from our personal and professional experiences in facilitating courses, that it could be argued from a generalist, non-sexist perspective that these male and female choices are not surprising considering that the male persona and ego, in general, is more independent in not seeking external help in 'solving one's own problems' while the females generally are so conscientious and diligent, that they often forget to 'celebrate their successes as an on-going process'. These of course are our own perceptions, and not based (as yet), in any analytical or statistical forum.

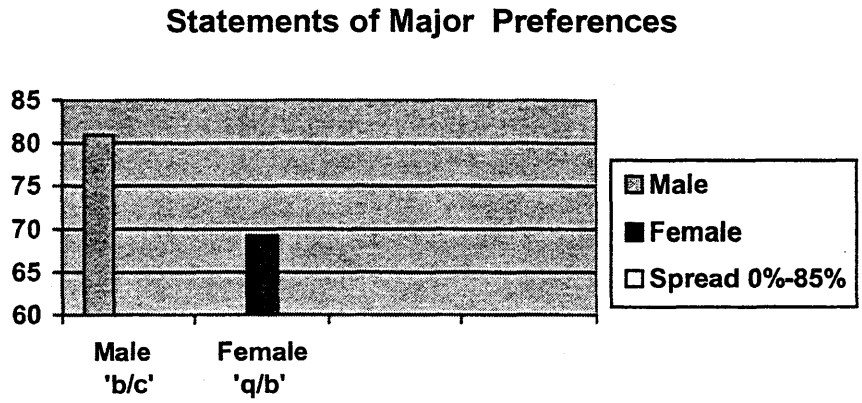
In question 6, we requested of the participants to further define their reflective experiences, and choose one or two statements ONLY which best defined the quality of the online learning courses in which they participated. The male participants overwhelmingly choose statements 'b' and 'c', and their female counterparts choose statements 'q' and 'b' (see table 2).

Saint-Onge & Wallace (2003) in *Leveraging Communities of Practice for Strategic Advantage* support the Wengerian perspective on learning through COPs by identifying the *"Five C's"* (conversation, collaboration, commitment, connectivity, and capabilities) as being common characteristics of a community of practice. The "Five C's" seem to mirror the

'preferential statements' of the participants on our courses (b, c and q in question 5 of the questionnaire)

Our students' choices would seem to confirm all of the above as being present in, and an integral part of, their communities on the courses in Denmark and Ireland.

Table 2



From a cross-cultural perspective, it was interesting to note that there were no significant differences between the male/female and/or Irish/Danish responses at a quantitative level at this early stage of our research. Moreover the striking similarities in the responses of both groups, throughout the questionnaire, would again seem to affirm the 'international' and universal appeal of the tenets of COPs as defined and outlined by the authors and affirmed by the participants in the questionnaires.

Conclusions

Our research so far shows that online learning COPs build on the ability to work together, pool resources and accelerate learning within courses. By their very dynamics, online learning COPs provide solutions to real issues, which confront other students on the courses. But more importantly, they inspire and inculcate all of us, students and tutors, with an on-going ability to learn in collaboration. The responses of the students (as indicated by tables 1 and 2) confirm that the main tenants of COPs, as identified and compiled by the authors and based on universally accepted characteristics of COPs, are recognised as being an integral part of the collaborative learning process.

By increasing the online Master courses' meta-capabilities to collaborate and learn, the responses of the participants to our questionnaire show that learning as a matter of change through collaborative participation has taken place. We would argue, even at this early stage of research, that the two online Master courses in question have led to a culture change among the participants in both Ireland and Denmark.

Appendix A: Research Questionnaire

Virtual Communities of Practice – Cross-Cultural Masters' Programmes

This questionnaire has been prepared by both Dr. Elsebeth Korsgaard Sorensen, Ph.D. Aalborg University, Denmark, and Dr. Daithí Ó Murchú, Ph.D. Trinity College, Dublin, Ireland. Its objective is to function as a means of assessing some of the effects which the Master Courses may have had on the formation of Communities of Practice among the students following one of the two online courses offered in Denmark and Ireland, respectively.

All information provided by you will be treated in the strictest of confidence and no reference whatsoever will be made to any person by name or identity number.

Based on your own personal experiences during your masters' Programme at MIL (Denmark) and MIC (Ireland), please answer the following questions to the best of your knowledge.

Please ✓ ONE answer only to as many questions as possible

1. Are you ? Male ☐
   Female ☐

2. Into which Age bracket do you fall?
   20-25 ☐
   26-30 ☐
   31-35 ☐
   36-40 ☐
   40+ ☐

3. Which of the following terms would best define your present working status?
   Administrative (business) ☐
   Administrative (education) ☐
   Management (business) ☐
   Management (education) ☐
   Workforce (business) ☐
   Workforce (education) ☐
   Private (business) ☐
   Private (education) ☐

4. Have you found that this Masters Course has lived up to your expectations?

   Yes ☐ (If you ✓ **Yes, please go to Question 5)**
   No ☐ (If you ✓ **No, please go to Question 7)**

5. Having answered Yes to question 4 please ✓ **as many** ☐ **of the following points as you wish** to support your answer;

My Masters' Course;

a. provided opportunities for discussion and a sharing of similar interests ☐
b. provided opportunities for reflection and exploration on issues which arose ☐
c. focused on and clearly articulated topics for discussion ☐
d. allowed for opportunities to learn from other's expertise, skills and competence ☐
e. provided opportunities to explore and discuss the latest developments in the field of study ☐
f. clearly outlined expectations for participation from the beginning ☐
g. allowed online and face-to-face relationships to become established ☐
h. gave a sense of passion among members in the pursuit of excellence ☐
i. actively encouraged enthusiasm, commitment and interest at all levels ☐
j. helped each other to solve problems of mutual interest ☐
k. provided opportunities for a good mixture of experienced and inexperienced people to share their experiences ☐
l. provided opportunities and techniques for establishing group identity and nurture trust among members as a community ☐
m. supported engagement, imagination and convergence ☐
n. recognised and celebrated successes at all levels throughout the course ☐
o. encouraged feelings of ownership of the course at the outset ☐
p. provided opportunities for learning in a supportive environment ☐
q. actively promoted and supported collaborative group work ☐
r. Other ? _____ ☐

_____

6. If you had to choose **ONE /TWO** of the points (a - r) ✓ **in Question 5 as the MOST important for you, which would it (they) be ?** ____ ____

7. In what way did the Masters' Course NOT live up to your expectations?

_____
_____
_____
_____

8. Any other comments?

_____
_____
_____
_____

Thank you for your co-operation in completing this questionnaire.

References

BATES, A. W. (1999): *Managing Technological Change: Strategies for Academic Leaders* San Francisco. Jossey Bass.

COLLIS, B. (1997): Experiences with Web-based environments for collaborative learning and the relationship of these experiences to HCI research. Published in the *Proceedings of the Working Conference of IFIP* WG 3.3, Sozopol, Bulgaria

COLLINS, T., MULHOLLAND, P., WATT, S. (2001). Using genre to support active participation in learning communities, in *Proceedings of the First European Conference on Computer Supported Collaborative Learning* (Euro CSCL 2001), Maastricht, the Netherlands, pp 156-164.

CECEZ-KECMANOVIC, D., WEBB, C. (2000): A Critical Inquiry into Web-Mediated Collaborative Learning. In Aggarwal, A. (ed.): *Web-Based Learning and Teaching Technologies: Opportunities and Challenges*. London: Ideal Group Publishing.

DANIELSON, J., LOCKEE, B., BURTON, J. (2000): ID and HCI: A Marriage of Necessity. In Abbey, B. (ed.): *Instructional and Cognitive Impacts of Web-Based Education.* London: Ideal Group Publishing.

HARASIM, L. (1999). A Framework for Online Learning: The Virtual-U. IEEE Computer Society Journal *"Computer"*, 32(9), 44-49.

KOSCHMANN, T. D. (ed.) (1996). *CSCL Theory and Practice of an Emerging Paradigm.* Lawrence Erlbaum Associates Publishers, Mahwah, New Jersey, pp 1-23.

PERSICHETTE, K, A. (2000): A Case Study of Lessons Learned for the Web-Based Educator. In Abbey, B. (ed.): *Instructional and Cognitive Impacts of Web-Based Education.* London: Ideal Group Publishing.

SAINT-ONGE, H. & WALLACE, D. (2003): Leveraging Communities of Practice for Strategic Advantage. Burlington, MA : Butterworth-Heinemann.

SORENSEN, E. K. (2002): Part of the Online Teachers Curriculum: Designing for Collaborative Knowledge Building Online. *Society for Information Technology and Teacher Education International Conference*, Vol. 2002, Issue. 1, 2002, pp. 995-999

SORENSEN, E. K. (2003a): A Challenge in E. Orchestrating the Symphony of Collaborative E-Learning. Accepted for publication in the *International Journal of Innovations in Higher Education* (IJIHE). (In press)

SORENSEN, E. K. (2003b): Intellectual Amplification through Reflection and Didactic Change in Distributed Collaborative Learning. *The International Journal on E-Learning* (IJEL). Vol. 1, Issue 2, 2003. http://dl.aace.org/6527 (In press).

WENGER, E. (1998): *Communities of Practice. Learning, Meaning, and Identity*. Cambridge University Press.

WOODRUFF, E. (2002). CSCL Communities in Post-Secondary Education and Cross-Cultural Settings. In Koschmann, T., Hall, R. Miyake, N. (eds.): *CSCL 2. Carrying Forward the Conversation.* Lawrence Erlbaum Associates, Mahwah, New Jersey, pp 157-168.

Learning by doing: Directing assessment to optimize the quality of student learning experience

Som Naidu
University of Melbourne

Learning by Doing

Research in learning and cognitive sciences has shown that the most effective way to teach new skills to learners is to put them in the kinds of situations in which they need to use those skills, and to provide mentors (expert practitioners) who are able to help learners as and when necessary (Schank, & Cleary, 1995). Through this engagement, learners come to understand when, why, and how they should use targeted skills on the job. They receive key lessons just-in-time, which is when they want the information, when it will make the most sense to them, and in a way that they will be most likely to remember the information for later use when they need it in their work.

Schank and Cleary (1995) have argued that the design of such a learning experience takes the form of a storyline in which students play a key role such as being a manager of an e-business or e-learning organisation. These roles are carefully selected to reflect those that students of such a program might actually do in real life, or might need to know about because they will very likely manage or collaborate with others who might be performing those roles. Students work in groups in these scenarios with the help of detailed information about the simulated context, together with project details. Supporting materials and resources are also available, and online mentors are available to answer questions and point students in the right direction on a needs basis (Schank, 1990; 1997).

This is the idea behind the story-centred curriculum (SCC) popularized by Roger Schank and his team (Schank, Fano, Jona, & Bell, 1994). The story in this instance is the simulated context in which the student plays a major role. The story in this curriculum serves as the essential scaffold. These researchers argue that stories have always been a part of human existence. We have always told stories, and the most powerful of all stories shape the way in which we relate to our world. Furthermore, we tend not to forget these life-changing stories. There is good reason then to make powerful stories the centre of educational practices. These stories must involve students as well as their peers, because that is how their work situation is most likely to be. A story-centred curriculum is goal-based, and the goals are those that the student has for entering school and following a curriculum in the first place. A story-centred curriculum is also activity-based. Students work through these activities to learn the critical skills they require in order to complete their mission and successfully accomplish their goals (Naidu, Oliver, & Koronios, 1999).

This is what is at the heart of the concept of "learning-by-doing". Learning designs such as these focus attention on improving the quality of the student learning experience. They ensure that the student learning experience is situated in authentic learning activities that reflect real life situations, that it is meaningful, and therefore inherently motivating for the student.

Goal of this Paper

This paper describes the integration of such a learning design and assessment tasks in a graduate level course that is offered exclusively in an online distance education format. As such, there are no residential requirements in this course. The subject matter of the course is "Instructional Design and Course Development for Distance Learning". This course is a core course in the Online Masters in Distance Education Program that is offered by the University of Maryland University College in collaboration with Carl von Ossietzky Universitaet Oldenburg, Germany.

The Assessment Tasks

Website Critique

Very early in this course, one of the first assessment activities that students are required to carry out is a critique of course websites of their choice. This assessment task requires them to search and analyze FIVE online course websites. They are required to focus their critique on all aspects of the design of the selected courses including their pedagogy and technical attributes, as well as their look and feel. They are required to develop their own criteria for examining these course sites. The criteria that they develop would reflect their understanding of issues that are germane to learning and instructional design.

The goal of this assessment task is to enable students to undertake a systematic and critical analysis of selected online courses. It is designed to develop the following skills in learners:

- Demonstration of approach to the analysis of online course websites.
- Demonstration of understanding of learning and instructional design and its application to web-based course design.

Management Report

Armed with a thorough grounding in sound principles of online course design and development, students are then required to produce a report reflecting their grasp of the management issues related to instructional design and the Course Development process.

To demonstrate competence in this kind of activity, students are asked to assume the role of an internal or external consultant to an organisation of their choice. An internal consultant is an in-house expert who is often asked to provide a service to another department, or division of the organisation. An external consultant is someone with the same sort of skill, but who is brought in from outside the organisation to provide that kind of service. This organisation is considering moving into online education and training. Its management has asked you to make a recommendation regarding the best way to organise and implement such a move.

Although a final report for this task could be quite comprehensive, for the purposes of this assignment, students are asked to focus their advice on the organisation of their online course development activities. Students are required to write a memo to the Vice President, which briefly describes at least three organisational models of course development, that is how the process will be staffed - who does what, what processes will be followed, where the process will be located within the organisation, etc. They are required to make a recommendation as to the preferred model, offering arguments in support of their decision.

This assessment task is designed to enable students to undertake a significant piece of report writing that would reflect their understanding of the subject of instructional design and course development for Open and distance learning settings. It is intended to achieve the development of the following skills:

- Development of skills in composition and presentation.
- Cultivation of skills in critical analysis and argumentation.

The Course Development Project

In being a course about the design and development of distance education courses, a core assessment task in this course is the development of an ONLINE course component. This does not have to be a whole course, but a segment, a lesson or a module of a course. Students are provided with the resources in order to be able to complete this task. However, the course is to be considered generic, and in principle, could be delivered using other media or other delivery environments. Students are required to defend all their learning and instructional design decisions, including utilization of media capabilities for presenting content, activating and supporting student engagement with that content, assessing learning outcomes and provision of feedback to learners. Their grade on this assignment will depend not only on what they create as part of this task, but also on their engagement with the work of their Study Group. Each study group member is expected to act as a student reviewer in the courses of their team members. The feedback they provide to their colleagues will also count towards their final assessment mark for this project.

The goal of this assessment task is to enable students to apply knowledge gained from the readings in this course and from interacting with their peers. Particular attention is placed on creative and innovative integration of learning theory into the design of a course for Open and distance learning. This assessment task is aimed at developing the following skills in learners:

- Transfer of theoretical knowledge into practice.
- Translation of conceptual knowledge into creative and innovative design.
- Creative application of the unique attributes of information and communications technologies.

The Learning Journal

In order to record their engagement with the foregoing assessment activities, students in this course are required to maintain a *Learning Journal,* which they turn in at the end of the term. This learning journal documents their plans and activities in relation to their website critique, management report, course development activity and their thinking on these tasks, what they learned from it, as well as their personal concerns and questions about it. In this journal, they are asked to pay particular attention to the learning opportunities that these assessment tasks presented to them, including what the tasks enabled them to learn about course design for Open and distance learning settings.

The goal behind this requirement is to enable students to systematically capture their engagement with the course design and development activity and learning in this course. For the assessor, the learning journal permits an insight into students' approaches to the course

development task, their thinking on the subject, what they learned from it, as well as their personal concerns and questions about it. The keeping of the learning log serves as a useful tool in the cultivation of skills in critical reflection in and on their own learning activities (Schon, 1983). It also reflects a student's ability to capture the less overt and less tangible aspects of their learning.

Discussion of Data Analysis

Twenty-four student *learning journals* (derived from the Fall 2002 cohort) were carefully studied in order to ascertain what the students thought they got out of the assessment tasks that they completed for this course. As expected, a great deal of interesting commentary was observed, which is not possible to reproduce in this paper. A snapshot of the gist of the students' commentary is presented in Table 1. In this table, we have tried to cluster the spirit of this commentary under six categories that emerged from the journal commentary. As such, they summarise what the students thought they got out of the assessment tasks in this course. Incidentally, they also reflect very accurately the key emphases of the course itself. Each one of these categories is discussed briefly in the following.

Instructional systems design. The technology of the Instructional Systems Design (ISD) process is a core component of this course. It offers a systematic approach to the design, development, and evaluation of learning and teaching. In this course, it offers students the primary scaffold for studying about learning and instructional design processes. Students suggested that the assessment tasks in this course enabled them to get a good grip of the ISD process, including various models of the process as well as the power of the technology.

Setting and assigning goals and objectives. A key lesson of the ISD process is how to go about setting clear and concise goals and objectives for any educational activity. This may seem like a simple process, but it is not. Educational practice is fraught with instances of poorly designed goals and learning objectives that are very hard to assess fully and fairly. The assessment tasks in this course were designed to give students plenty of practice in setting goals and objectives. Students in the course suggested that these activities enabled them to rethink contemporary practices in the setting of goals and objectives, and their importance to learning and the assessment of learning outcomes. They said that they also learned how to go about setting clear goals and objectives that are meaningful to learners, and which serve as scaffolds or road signs for learning.

Pedagogical models and learning theories. At the heart of instructional design lies an adherence to how human beings come to learn something. There are several theories about how humans do learn. The assessment activities in this course required students to examine these critically. They were also required to demonstrate their competence in the translation of their preferred theoretical perspectives into real learning and teaching activities. Students said that because of these assessment tasks, they were a lot better informed about pedagogical perspectives on learning, about the role of students and teachers in these contexts, and also the important role that pedagogy played in instructional design.

Assessing and measuring learning outcomes. Sound pedagogical design and carefully crafted learning outcomes can be meaningless to the students if the assessment strategies employed are not designed in ways to assess these learning outcomes fully and fairly. The development of suitable strategies for the measurement of intended learning outcomes is very critical to good instructional design. Educational practice is littered with terrible examples of

assessment practices. In this course, by the design of its own assessment activities, we tried to emphasize the importance of setting authentic assessment tasks. These tasks are designed to be congruent with the pedagogical perspectives of the course and reflect more accurately the kinds of activities that students are likely to be engaged in when they leave formal education. As such, authentic assessment tasks serve as a form of apprenticeship for novices. Students of this course seemed to think that the assessment activities in this course were able to achieve those goals. They said that as a result of these activities, they were better informed about various methods of assessing learning outcomes, and how to make assessment more authentic, more meaningful, and motivating for students.

Use of media and delivery methods.

The selection of the tools and technologies for teaching and supporting learning activity are just as important considerations in the design of learning environments. The technology of instructional systems design suggests that this is often a matter of matching the choice of media with a whole range of variables including, the type of learners, nature of the subject matter, and the mode of the learning and teaching transaction. In this course, we were exploring opportunities for distance education and online learning. Students seemed to suggest that they were able to gain an understanding of a wide range of possibilities in this regard, and more importantly, the methods for selecting appropriate technologies for particular learning contexts.

Team approach to course development.

Much of course development activity, and especially for distance education and online learning is a team effort. Therefore, practice within a team is one of the things that we have been trying to make more use of in this online Masters in Distance Education program. Students are required to work in small groups to negotiate a whole range of issues that are germane to course design and development. Students felt that this kind of activity gave them essential practice in critical tasks associated with project management such as, leadership, vision, stewardship, and communication skills.

References

NAIDU, S., OLIVER, M., & KORONIOS (1999). Approaching clinical decision-making in nursing practice with interactive multimedia and case-based reasoning. *The Interactive Multimedia Electronic Journal of Computer Enhanced Learning (http://imej.wfu.edu/).*

SCHANK, R. C. (1990). *Tell me a story.* Evanston, Illinois: Northwestern University Press.

SCHANK, R. C. (1997). *Virtual learning: A revolutionary approach to building a highly skilled workforce.* New York: McGraw-Hill.

SCHANK,R.C.,&CLEARY,C.,(1995).*Engines for education.* http://www.ils.nwu.edu/~e_for_e/, Hillsdale, New Jersey: Lawrence Erlbaum Associates.

SCHANK, R. C., FANO, A., JONA, M., & BELL, B. (1994). The design of goal-based scenarios. *The Journal of the Learning Sciences*, *3*(4), 305-345.

SCHON, D. A. (1983). *The reflective practitioner.* New York: Basic Books.

Acknowledgement

I am very grateful to Carol Jasen (doctoral student at the University of Melbourne) for patiently sifting through twenty-four *Learning Journals* in order to produce Table 1.

Snapshot of Students' Reflections on the Assessment Activities					
Instructional Systems Design	**Setting and assigning goals and objectives**	**Pedagogical models and Learning theories**	**Assessing and measuring learning outcomes**	**Use of media and delivery methods**	**Team approach to course development**
Knowledge about the instructional systems design (ISD) process. Recognised the power of the ISD approach. Understanding of good design and of the role of the instructional designer. Understanding of the design process for online and distance education courses. Clear about how a systematic approach to designing instruction results in reliable course design and learning. The roots of ID and basic theories that influence ID models - behaviorist, cognitive, constructivist. ISD as a preferred methodology for moving educational material online.	Importance of setting learning objectives. Re-thinking the use of learning objectives used currently and developing objectives for the online course project. Using a systematic approach to clearly define what is to be learned – objectives. Developing goals and objectives around 'What is learning?' Define learning outcomes by turning task statements into objectives. Made aware of the discipline of writing clear objectives and defining specific, measurable learning outcomes.	Pedagogy and its place in course design. Identified different pedagogical approaches - behaviorist, cognitive, constructivist. Much better informed regarding pedagogical models and in particular the constructivist approach. Importance of understanding what knowledge learner brings to the situation. Build on what is already known. Role of instructor as facilitator, rather than just as a lecturer. Understanding of pedagogical design, user-centredness, self-directedness, teacher/facilitator, discovery learning, and active learning.	Better informed about methods of assessing student learning. Knowledge about the differences between criterion referenced and norm referenced tests. How to make assessment authentic, realistic and more meaningful and motivating for learners. Dispelled many beliefs held about assessment. Assessment of student learning is critical and must be in the design concept for the course. Assessment should be tied to objectives that take into account many paradigms and domains. Knowledge about different ways of assessing learning outcomes (formative and summative assessment).	Understanding of delivery systems and integrated (blended) technological approach. Methods for selecting appropriate technology and how best to use each one to meet objectives of online course design. Knowledge of delivery systems - print, audio-visual, computer-based, teleconferencing. Identification of alternative delivery methods for online distance education courses. Implementation of various types of multimedia suitable for incorporation into online course material.	Solidified understanding of project management and potential pitfalls. Importance of the need for the client to be ready to implement an online course. Types of evaluation. Knowledge of evaluation & systematic acquisition of feedback. Teamwork - ID requires a team approach to work effectively. Importance of analyzing needs. Development of business-driven performance outcomes. Importance of solid management skills - communications, leadership, vision, stewardship, organisation.

Table 1. Displays a snapshot of what students think they got out of doing the assigned

Can NOUN accommodate me, my grades and my work?

Mercy F. Ogunsola – Bandele
National Open University of Nigeria

Brief History of NOUN

The ever increasing growth rate in Nigeria population and the country's irrevocable and unwavering commitment to provide Education For All by 2015 has made the urge for Open and distance learning more pervasive than before.

The resuscitation of the National Open University of Nigeria (NOUN) which was first started in 1983 and suspended in 1985 has begun in earnest with an expected initial enrolment of about 60,000 students when the university begins the delivery of instruction by June/July 2003.

The mission of NOUN is *to provide functional, cost-effective flexible learning which adds life-long value to quality education for all who seek knowledge.*

The vision of NOUN is to be regarded as the foremost University providing highly accessible and enhanced quality education anchored by social justice, equity, equality and national cohesion through a comprehensive reach that transcends all barriers.

Programmes

NOUN intends to run its programmes through four schools and one centre. This includes:

- Centre for Continuing Education and workplace learning
- School of Arts and Social Sciences
- School of Business and Human Resource Management
- School of Education
- School of Science and Technology

The centre offers several basic life-long and vocational skills development stand-alone courses for continuing education and workplace training. This leads to the award of a University certificate. The programmes in the schools however lead to the award of University Diplomas, Postgraduate Diplomas, First and Master degree in various disciplines.

Admission Requirement

From the university prospectus the admission requirement for each programme is as follows:

i. ***Diploma Programmes***

(i) At least Three Credits in the Senior School Certificate Examination or equivalent.
(ii) Teacher's Grade II Certificate with a minimum of three merits.
(iii) National Diploma from a recognised institution may also be admitted

ii. ***Undergraduate Degree Programmes (General)***

(i) Five Credits in the Senior School Certificate Examination obtained at not more than two sittings in subjects relevant to the proposed field(s) of study.
(ii) Teacher's Grade II Certificate with minimum of five merits in subjects relevant to the proposed field(s) of study.
(iii) Other qualification equivalent to those listed in (i) and (ii) above.
(iv) The five subjects should include English Language in the case of those applying for admission into Arts, Business Administration, Education (Arts), and Social Science Course(s). Candidates applying for Agriculture, Education (Science), and other Science-based Courses where a credit in English is not mandatory, a pass in the subject is required.
(v) A credit level pass in Mathematics is required for all Science-based courses, Social Sciences and Sciences Education.
(vi) Candidates awaiting the results of any relevant examination may apply.
(vii) Five subjects passed at not more than two sittings at the S.S.C.E./GCE 'O' Level and 'A' Level. The subjects also should be relevant to the proposed programmes of study. Candidates are also expected to fulfill English Language and Mathematics requirements for the respective programmes.
(viii) N.C.E with the requisite number of SSCE/GCE 'O' Level/NECO or Teacher's Grade II Certificate subjects (mainly for courses in Education).
(ix) International Baccalaureate with two of three 'A' level subjects and the prerequisite number of 'O' level credit passes
(x) NRN and NRM are acceptance qualifications for Nursing.
(xi) NABTEB Qualification.
(xii) Any other qualifications as approved by the University.

Candidates should note that at least two (2) of the credits must be relevant to the proposed programme of study.

Consideration of an applicant's suitability will take cognizance of prior knowledge, acquired skills and workplace training and experience relevant to the programme of studies.

(iii) ***Post-Graduate Diploma***

A graduate from a recognised University, with at least a second-class lower division or a person with a qualification adjudged to be equivalent to a first degree may be admitted in the programme. A holder of a minimum of lower credit in the Higher National Diploma from a recognised institution may also be admitted.

(iv) ***Masters Degree Programme***

a) A candidate with a first degree from a recognised University with a minimum of second-class lower division may be admitted, provided the matriculation requirement is satisfied.
b) A candidate with a good post-graduate diploma from a recognised University may also be admitted to a Masters Degree Programme provided the University matriculation requirement is met.

Sale Of Forms

With the various activities/arrangement in place for the University's take-off:

- Designing, development, acquisition and adaptation of course materials
- Hiring of different categories of staff
- Planning and establishing of the Technology Infrastructure
- Establishment of support services which includes location of Study Centres in 16 states in the first instance.

The advert for the sale of admission forms came out in some National Newspapers in late February 2003. Candidates started trooping into the Kaduna Campus (one of the Centres) from the 3rd of March 2003 to make enquiries

Enquiries

Below are recorded encounters with some of the candidates. Some of their statements have been paraphrased.

Candidate A

I am a sales man with Longman's PLC. I finished my High School in 1995 without a credit in English and mathematics. I have been resitting these papers with no luck. Unfortunately I got admitted to a polytechnic for a diploma in marketing. After my graduation–still wanting a university degree-I put in again for English and Mathematic. I finally made it in the year 2002. Can I now change my field to take a degree programme in criminology?

Candidate B

I am a driver for one of the new generation banks. I finished my High School nine years ago but failed English language. I have been resitting this examination over and over again. Can NOUN accommodate me, my grade and job?

Candidate C

I am a deputy director in one of the government parastatals. My daughter had 3 credits (without English and Mathematics) in the West African School Certificate Examination in 1999. She has gone for a resit three times by 2002 with no additional credit other than in the former three subjects. How can NOUN accommodate these grades?

Candidate D

I am a switching manager with the Nigerian Telecommunication system. I finished my secondary school over 25 years ago and have attended several courses on Telecommunication-equivalent to a diploma degree. Due to the nature of my work, I could not be released to study in a conventional university because of the length of time. I have five credits in the relevant subjects. Can NOUN accommodate me and my job for a Postgraduate or Undergraduate Degree in Digital Communication or Communication Technology.

Candidate E

I am a registered nurse in a government hospital. The only university offering Nursing programme at degree level is based in the South while I am based with my husband in the

North. I didn't apply since I couldn't see the possibility of leaving my job. How can NOUN accommodate me and my jobs.

Candidate F
I lost my parents while I was in the secondary school and had to leave school to start working. I have earned the five credits in relevant subjects through the external G.C.E. But I can't stop work since I am helping my younger one. Can NOUN accommodate me and my job?

Candidate G
I am a registered Nurse in one of the hospitals. I am tired of the profession and I want to apply to read Criminology but I don't have a credit in English language. Can NOUN accommodate my other relevant grades?

Candidate H
My mother in law age (58) is retired Headmistress. She had her grade II teachers Certificate as far back as 1964 with 4 merits. She now wants to apply for a first degree in Early Childhood education. Can NOUN accommodate her grades?

Candidate I
My uncle is a retired Customs Officer as well as a retired Headmaster. He had a grade II teacher Certificate (year withheld) with the required grades. He wants to apply for a degree in Peace Studies and Conflict Resolution. Can NOUN accommodate his grades?

Discussions

In all the above enquiries, candidates had great fears concerning their grades and for a few others their work.

Candidate A, D and G and I have the chance of admission after meeting requirements (i), (ii) and (iv) under the Undergraduate degree programme. But while candidate D might earn advanced credit since the course he is applying for is directly related to the intending course, candidate A and G might not.

Candidates B, C, and H with a deficiency in one subject or the other could be accommodated for foundation courses.

Potential students who do not have acceptable tertiary entry requirements will be advised to undertake and successfully complete the relevant pre-foundation –foundation programmes to fulfil the enrolment requirement for the programme of their choice. The main emphasis by NOUN is for such candidates to remedy their deficiencies necessary for tertiary study. Also for admission NOUN takes cognisance of prior knowledge acquired skills and workplace training and experience relevant to the programme of studies.

As regards candidates B, D, E, and F who are afraid of losing their jobs, such fears shouldn't arise in a university with a motto "work and learn" as the open university has opened access for training and retraining to reinforce opportunity in workplace. So one can see some of the candidates are already thinking of how to retrain to move to areas of specialization where there are "jobs without people", for according to Borisade (2003) Nigeria is "confronted by a constant need to move people without jobs to jobs without people by building new human capacities through the avenues of distance learning".

The flexibility and accessibility of NOUN has also brought Education closer to the people irrespective of their age (candidates H and I), and location. This is in line with Dhanarajan (2003) statements that "Open and distance learning has the unparalleled ability to satisfy the exceptionally large demand for education by huge and rapidly expanding populations which are still mainly rural, remote, under-represented, and marginalized through resources, location, economic and other reasons".

Finally as more and more enquiries are in, one can see the excitement in these candidates to avail themselves of this new educational opportunity. For it is a rare chance that must not be missed

References

BORISHADE B. (2003) Text by the Honourable Minister of Education in the National Open University of Nigerian Prospectus. 4.

GHANARAJAN G. (2003) Text by the President Common Wealth of Learning in the National Open University of Nigerian Prospectus. 5.

The Procrustean paradigm: a fable of conflicting values in Online Learning and Distance Education

Jennifer O'Rourke
Independent Consultant, Canada

> "The last temptation is the greatest treason
> To do the right deed for the wrong reason."
> Thomas of Canterbury, in T. S. Eliot's Murder in the Cathedral.

Overview

Although it is sometimes assumed that the field of Open and distance learning is based on common values and goals, in fact there are many sub-cultures in ODL, each with its own values and operating principles. Discovering that an organisational partner has values and goals that do not fit with one's own provides an abrupt object lesson that in ODL there is no broad consensus on values, purpose, or perspectives on learners and learning. Encountering another ODL culture can be an opportunity to reflect on what elements in our own practice are essential to the values and mission we have espoused.

The following fable is based on a real situation in which two organisations worked on an ODL initiative, and the contest between different approaches indicated an inherent divergence in values. Introducing a new technology into the situation conflated some issues, but the heart of the debate came down to values and goals. For the sake of maintaining some equanimity, I have changed the names of the organisations involved, but the essentials of the story are based on my own experience in the situation as a course author, the partners' planning documents, and email discussions among the course authors and partners. The lessons learned have broader applicability: they serve as a reminder of the importance of examining closely the reasons for what we do, and of considering the issues and purpose of a specific educational enterprise before commitments are "set in stone" to a particular methodology or technology. Doing the right thing for the wrong reason can undermine both the goals and outcomes of the most well-intentioned mission.

Background

Two themes provide a backdrop to the story: one is the divergence between social mission and entrepreneurship approaches to ODL and the other is the impact of values and goals on the application of a new technology.

For a good cause or a good return

There have always been (at least) two distinctive streams in Open and distance learning; social mission and entrepreneurship. Both originated in the 19th century. The first is based on the social equality traditions that informed initiatives to provide broader educational opportunities to those excluded from post-compulsory education by social, financial, or geographical barriers. Some examples are the Workers' Educational Association, Everyman Publishing, community based extension programmes from North American land-grant universities, and the original rationale for establishing the UK Open University.

The entrepreneurship approach to education and ODL has an equally long tradition. It includes commercial correspondence schools that began in North America in the late 19th century and continue, with some adaptations, to the present; universities and colleges that offer opportunities for accreditation to external students on a for-profit basis; and the commercial courses provided by IT giants offering name-brand accreditation in using and managing their software. The primary goal is to make money by providing a product that the public wants. Whether the product is the education programme or the expected accreditation is not always clear: we will come back to this point later.

ODL providers that have branched out from each of these two roots tend to remain true to their origins, unless there are enormous pressures to change, such as the major upheaval in the social, political and economic dynamics of South Africa (Glennie, 1995). While some may argue that it is possible to be profitable and achieve a social mission, the evidence from the past thirty years indicates that this is very difficult to do in Open and distance learning (Perraton 2000; Rumble 1997; Ryan 2001; Nonyongo 2003). This is because continuing investment in learner services is needed to provide genuinely accessible programmes that give learners a reasonable chance to achieve their goals, as opposed to simply offering them a long shot at accreditation.

New technologies support existing values

As Franklin (1990) points out, the introduction of a new technology can highlight pre-existing differences in underlying values and approaches, and this is also true of online learning. Online learning can be used for low cost delivery of information, in what Noble (1998, 2001) calls "digital diploma mills", either in conventional educational settings or in Open and distance learning contexts. Alternatively, online learning can be used to enable learners to participate in a responsive, interactive programme with opportunities for collaborative learning. It is unlikely that a single online course will attempt to do both, because of the inherent incompatibility between the philosophies underlying each approach, as well as the conflicting practicalities of implementation.

The Story

The fable describes what happened when an organisation with a primarily social equality approach to ODL worked in partnership with an organisation that has a mainly entrepreneurial approach, to develop a distance-delivered graduate programme in Open and distance learning theory and practice. We will focus on key points of divergence that were rooted in different attitudes to the mission, the learners, the process and the outcomes: these points were highlighted in decisions that unfolded during the development phase and in discussions about these decisions.

For more than a century, Gradgrind University, trading on its formidable reputation as a major European university, has enabled candidates for a large range of qualifications to sit exams without attending lectures or tutorials on site. Over many decades, this arrangement has evolved, sometimes providing course outlines and exam preparation information, and, in a few disciplines, offering full-fledged distance courses, complete with study guides, print and audio materials and ongoing assessment from tutor-marked assignments. However, the predominant framework of Gradgrind's external programme is as an enterprise to provide opportunities for accreditation. This is their mission statement:

"To promote worldwide a programme of degrees and other awards primarily for students who cannot attend full time courses at the university. Objectives: 1. To promote through examination, and where appropriate, distance learning, a portfolio of degrees and other rewards for external students of the university. 2. To develop high quality distance learning materials to support external students."

For more than ten years, Gradgrind, in partnership with a small international organisation, Copperfield Institute, has provided a graduate programme in the theory and practice of Open and distance learning, as a "full service" distance education programme. Participants were from all over the world, and included a significant number from regions with limited technologies and resources. Although Gradgrind awarded the accreditation, managed exams and provided general oversight, Copperfield operated most aspects of the programme, including course development and course tutoring. Copperfield's involvement in the programme complemented its mission to: "support the development of innovative and flexible education in developing countries....through capacity building and human resource development, by teaching, training, research and advice, using participatory approaches. We are committed to increasing equitable access to quality education for people at the margins, through partnership and collaboration."

The Copperfield/Gradgrind graduate programme in ODL achieved a reasonable degree of success, serving participants who would otherwise have been unable to access graduate learning and accreditation in ODL practice. Many participants faced additional challenges to those met by distance learners in wealthier countries, such as limited access to libraries and technologies: in these circumstances, their successful completion of the programme is a significant achievement.

By the time the programme was due to be updated, Gradgrind had decided to adopt online technology for both internal and external students, and had begun several online pilot projects. The proposal to renew the ODL programme was recast as an initiative to offer the programme primarily online. This presented a dilemma for Copperfield: How could Copperfield meet its goals of using the programme to provide access to graduate development and capacity building to their clients, who were mainly in regions with limited technologies and infrastructure? Pennells (2003) explores a similar Hobson's choice for a small ODL organisation dealing with push/pull forces for adopting online technologies: either face the prospect of being sidelined as outmoded, or risk excluding a significant proportion of its constituency. The most likely prospect was that potential participants in the regions that Copperfield served would be excluded by the new technology. It is not clear whether this exclusion was deliberate, or simply the byproduct of a decision to "refocus the market" to attract learners from rich countries, but Copperfield's development proposal stated that the redesigned programme should appeal specifically to first-world participants. Online learning would be a significant factor in its appeal.

An institution's adoption of new technology can prompt a re-visioning of the nature and purpose of its mission to distance learners (Farrell, 2001). However, this depends on the reasons for providing outreach in the first place: if the goal is to provide reasonable opportunities for accessible, successful learning, then the questions will relate to how the new technology can enhance that goal. If the goal is to be more efficient and cost-effective, then questions are less likely to focus on the learners and their needs.

As the programme redevelopment started, Copperfield recruited course authors who were all experienced ODL practitioners with multiple skills as teachers, researchers, writers and administrators: most had taught online. Their view of ODL was consistent with Copperfield's social equality approach. As they proceeded with their work, they encountered issues that demonstrated the gap between the two institutions' perspectives on the programme. Some of the key issues were related to assessment of learners; how technologies would be used to support learning; access to learning resources; and the role of the tutor.

The Issues

Assessment

Gradgrind's primary objective, as identified in its mission statement, is to provide access to qualifications through examinations. The existing Copperfield ODL programme had provided for ongoing learner assessment through assignments, in addition to or instead of final exams. However, as the Copperfield programme redevelopment was underway, Gradgrind stated its insistence that final examinations would be required for all courses in the programme and would count for most of the final mark. Course authors responded with dismay at the implications of this decision: how could they convey to participants the importance of flexibility and learner-responsiveness if their own experience was a very inflexible form of assessment? How could learners integrate reflective practice into their work and learning if they would never see the marker's comments on their final exam? And why would people enrol in a programme that emphasised final exams as the "gold standard" of assessment if they were truly interested in developing their expertise in providing flexible, accessible, learner-responsive ODL?

The debate was hampered by the fact that the authors were not dealing directly with Gradgrind, but with Copperfield, which was in the unenviable position of relaying Gradgrind decisions to the course authors, and of attempting to convey the authors' responses to Gradgrind. After many months, Gradgrind agreed to allow for some continuous assessment, so that final exams counted for 60% of the final grade. However the issue resurfaced when it was revealed that course tutors would not mark learners' final exams. As one author put it, this decision undermined their intent of integrating assessment with learning. In their course design, the final exam draws on the knowledge and experience gained from online discussions, making it essential that the tutor who engaged online with learners also marked the final exam, to ensure continuity and consistency.

In hindsight, it is not surprising that the course authors' arguments failed to change Gradgrind's essential position on assessment, given that the authors' priorities were very different from Gradgrind's. Gradgrind's goal was to provide accreditation, and in this it valued predictability, reliability, efficiency, and standardisation. In contrast, the course authors' stance was based on providing learning and assessment opportunities that met the learners' needs, a process that is unpredictable, flexible and individualised, although it can still be accountable and verifiable.

How technologies are used

"If you browse through the recent literature on distance education and open learning you will notice the distinction that has been drawn between the use of the delivery media to support the communication of information and the use of the delivery media to support person to person interaction. There are those who see the role of online learning in terms of the delivery of

Web-based materials. There are others who see the value of technology as lying in its capacity to support interaction between teachers and students and between student and student" (Inglis et al, 1999).

Browsing through the email discussions among course designers and Copperfield about the nature of online provision makes it clearer, in hindsight, that Gradgrind's operating assumption for online learning was closer to the information-delivery model, and the course authors' framework was an interactive learning model. This disparity was not completely evident at the time, and led to other misunderstandings. Course authors, believing that Gradgrind's purpose in introducing online provision was to enable learner interaction, regarded this as an indicator that Gradgrind was shifting its emphasis from credentialling to provision of accessible learning: this belief dissolved during the debates about final examinations.

Given the emphasis on including online provision in the revised programme, course authors designed their courses to accommodate online learner interaction and collaboration. At the same time, Gradgrind's technical staff were configuring software and designing websites for the programme, but without consulting the course authors about how learners and tutors would use the online capability. Several course authors who used the software in another course application discovered that its provisions for discussion and collaborative learning were very unwieldy. Although there were reassurances that the technical problems would be resolved, there is considerable doubt that the software or website will accommodate what might be called higher-order interactions that go beyond information exchange.

Access to learning resources

The disparate positions on the purpose of technologies emerged again when Copperfield announced that Gradgrind had decided it was too costly to provide learners with print study guides, even though learners would receive print collections of relevant articles selected by the course authors. The authors argued that print guides enabled learners to proceed even if technical difficulties prevented online access, and that their cost was minimal, especially compared to the cost of the online technology. For Gradgrind, putting the study guides online was consistent with a position that delivery of resources was a central purpose of online systems, whether or not it was the most appropriate or cost effective method.

In a related issue, Gradgrind's online initiative included a proposal to provide an electronic library service that offered access to electronic journals for which the university held subscriptions, and to web-based materials that were publicly available. However, unlike most distance education providers, the university library would not be able to provide print resources in response to specific requests from distance learners. This limitation meant that learners in a graduate programme would have to rely on their own access to local resources or online materials if they wanted to research a topic not covered in an e-journal in the library's holdings.

The role of the tutor

"Thinking of the knowledge media simply in terms of the transmission of information is likely to foster an approach to learning that accentuates the acquisition of explicit knowledge. For the electronic delivery of courses to be effective, it needs to enable learners to engage in associated practice" (Inglis et al, 1999) .

As course authors were recruited for the redevelopment of Copperfield's programme in ODL, they were encouraged to consider themselves also as future tutors of the courses they prepared. As a result, course authors brought their view as prospective tutors into the discussions on issues and policies, and anticipated their roles would involve "enabling learners to engage in associated practice." Near the end of the year-long development process, it became evident that Gradgrind regarded the tutors' role as much more peripheral than the course authors did. This became especially clear when it was stated that tutors would have no role in marking final examinations. Course authors responded with concern about the lack of continuity and lack of regard for the tutors' role in engaging with learners through online and individual interactions throughout the course: they had designed the courses with active roles for tutors as guides, mentors, facilitators and assessors. Gradgrind did not articulate its view on the tutor's role or provide a job description, but its position that tutors would not mark final exams is consistent with a stance that the technology delivers the course and the tutor serves as a back up if learners have questions or difficulties.

Analysis

Although many of the course authors felt there were inherent contradiction between Gradgrind's adoption of online learning and its insistence on practices that emphasised product over process, it is quite possible that for Gradgrind, there was no conflict. The Copperfield programme had always been an anomaly in that it offered full fledged distance education rather than simply providing basic information needed to access exams; the syllabus, course texts, and directions to the exam location. Where the course authors saw the potential of online provision for expanding the range and depth of learning processes and as part of a continuum of interactive learning mediated by several technologies, Gradgrind regarded online systems as an efficient delivery mechanism.

For Gradgrind, it was consistent to insist that final exams are the essential assessment tool, because exams had always served as the "gold standard" of quality control, ensuring the products- the graduates- met the university's specifications. The delivery method, whether print or online, was immaterial to the product, just as furniture shipped by lorry is the same as furniture shipped by train. All that mattered was that the product arrived at the destination in the required condition.

Another interpretation is that Gradgrind's emphasis on delivery and accreditation is actually very consistent with one underlying goal of online learning--- to support accessible credentialism. Although Gradgrind had provided offsite degrees for more than a century, it saw this service largely as an extension of what it did on site, to provide a gateway to a "good" credible degree (the product), rather than providing access to learning (the process). Despite its experience in distance provision, Gradgrind has more in common with traditional educators who see online learning as an opportunity to deliver content in an industrialised, cost effective, monitored way, emphasising product rather than process, and market demand rather than learning needs.

Copperfield's position in this fable is complex. On one hand, it agreed with the adoption of a technology that could effectively exclude Copperfield's constituency from participation in the programme. On the other hand, it encouraged the course authors to develop courses that reflect best practice in Open and distance learning and provide for reflection, analysis and collaborative learning. Copperfield provided support and an open forum in which course

authors could discuss issues as they arose. But it had limited options for responding to the course authors' concerns because it was not in a position to set policy.

Values tend to be reflected both in organisational operations and in approaches to education. The differences between the two organisations demonstrate "differences between the industrial age and information age that affect education - adversarial vs. cooperative relationships; bureaucratic vs. team organisation, autocratic vs. shared leadership, one-way communication vs. networking, and division of labour vs. integrated tasks." (Reigeluth 1996, referenced in Collis and Moonen, 2001).

In addition to the organisational disparities, the issues that arose during programme development are based on an inherent conflict between two different perspectives of online learning; as distance learning with additional options and features, or as a more efficient means of delivering conventional education and qualifications. These perspectives are rooted in values and goals that sustain either a social equality approach or an entrepreneurial approach to Open and distance learning.

However, these conclusions come with the benefit of hindsight and from reflections with colleagues. A review of our communications at the time indicate that we course authors never completely recognised the conflicting perspectives underlying the issues. There are a number of possible reasons why this was the case:

- The previous longstanding successful partnership in offering a similar programme probably led to a belief that operational issues could be readily resolved at an operational level, when in fact they reflected inherent organisational differences of principles;
- The fact that the programme's subject matter was itself Open and distance learning led to assumptions that the two organisations had compatible perspectives on good practice in ODL, and the ODL-as-content factor also conflated some of the issues;
- Gradgrind's longstanding operations in the area of serving distant learners led to an assumption that they were distance educators, rather than deliverers of degrees to distant applicants. Despite evidence to the contrary, our well reasoned arguments were based on assumptions that Gradgrind was operating on the same principles as we were;
- The course authors' operating assumptions that the purpose of the programme was to provide accessible and richer distance learning experiences blindsided us to the other perspective of online learning; as a more efficient delivery mechanism, more cost effective and profitable for the institution. We did not see that arguments about quality of learning were unlikely to register on Gradgrind's cost-efficiency radar screen;
- Gradgrind's policy and procedure decisions that seemed contradictory to the course authors were conveyed by Gradgrind to the Copperfield coordinator, who as messenger and mediator relayed these decisions to the course authors. As a result, the course authors could not directly question the rationale of Gradgrind decision makers, and communication was filtered so that there was no opportunity for the kind of dialogue that would reveal each group's operating assumptions.

Conclusions and lessons learned

In the end, the isolation from Gradgrind meant the course authors produced courses that reflected their own and Copperfield's values and beliefs about good practice in distance education. The completed courses have been carefully assessed and approved by experienced distance educators who value learner-centred and learning-centred distance education.

The next chapter of the fable is yet to emerge. One possibility is that the Copperfield programme will serve as a model of good practice as Gradgrind's increasing involvement in online learning brings it closer to the field of distance education practice. Gradgrind is introducing online learning into other programme areas, and as one of the first, Copperfield could provide leadership. Another possibility is that the inherent contradictions between the learner-centred course design and the Gradgrind focus on assessment and accreditation will prove to be too discordant for the Copperfield programme participants, who will either withdraw, participate in a minimal way to get accreditation, or stay away.

Despite the fact that it was hard to recognise the roots of conflicting positions at the time, there are lessons to be learned from the experience; about analysing the principles underlying innovation, about the organisational dynamics of partnerships, and about maintaining one's values.

Questioning innovation

Some guidelines about innovations in ODL can be articulated in response to the following question:

How can you tell if an initiative to introduce a new technology and methodology is doing the right thing for the right reasons?

- Is there a clearly articulated vision that is consistent with the goals of the programme, and that serves to guide the process of consultation and development? For example, the innovation should not exclude people who previously had access, or restrict teaching/learning approaches to a narrow band of the spectrum of possibilities.
- Does the new technology or methodology increase choices, for educators and learners, in the design and use of resources for learning, rather than constrain choices, (for example, by limiting the type of media that can be used, or approaches to teaching and learning)?
- Do the demands of the technology or methodology trump the requirements of effective teaching and learning, rather than allowing the requirements of effective learning to determine how the technology or methodology is applied?
- Are increased investments in the technology or methodology used as a reason for reduced investment in proven ODL practices, and/or in other areas of open and distance provision, such as learner support?
- Is the rationale for the innovation presented in language related to learning and learners' needs, rather than the language of the marketplace?

If educators and learners share the goal of a more responsive and responsible learning experience, and your answers are yes to 1, 2 and 5, and no to 3 and 4, there is a good chance that the innovation will be consistent with your goals, and you are all doing the right thing for the right reason.

Suggestions for effective partnerships

- Read evaluations before proceeding in a new direction (or any direction). Towards the end of their course development work, course authors received an external evaluation of the previous programme which commented on its lack of opportunities for critical thinking. Many of the authors' positions on assessment, resources, and online learning were based on building opportunities for critical thinking into the new courses, but their efforts were constrained by the limitations imposed by Gradgrind's frame of reference, assessment requirements, and administrative provisions. Ironically, when Gradgrind circulated the evaluation report and recommended including opportunities for critical thinking in the new programme, many authors had already completed their work, having struggled to achieve this despite constraints imposed by Gradgrind's vision of the programme.
- Don't get into bed with an elephant unless you're prepared to sleep on the floor. Although the prospect of resources may be appealing, a small organisation in partnership with a large well-funded organisation may have to surrender its unique vision and the attributes that have made it responsive to the needs of learners.
- If there is no opportunity for partners to articulate and exchange visions, ideas and goals, everyone will miss an opportunity to learn. Without this exchange of basic visions, discussions can come down to technical fine tuning and pragmatic compromises that leave the learners' concerns last. For example, in this situation, the issue of the programme's accessibility to learners in poorer countries got lost early on in the action.

Values shape decisions: decisions shape values

Finally, a generic lesson that might apply equally to educators, chancellors and bishops. Doing the right (or current) thing for the wrong reason means adopting a single-mindedness that precludes an appreciation of the depth and diversity of human needs and gifts that make education, and life, worthwhile and interesting.

Note: The author would like to thank colleagues for their comments on draft versions of this article. The conclusions expressed in this article are those of the author: others may have different perspectives on the experience and its outcomes.

References

COLLIS, B AND MOONEN, J., (2001) *Flexible Learning in a Digital World: Experience and Expectations,* London, Kogan Page

ELIOT, T. S., (1935) *Murder in the Cathedral*, London, Faber

FARRELL, G. (2001) *The Changing Face of Virtual Education*, accessed April 03 from http://www.col.org/virtualed/virtual2pdfs

FRANKLIN, U, (1990) *The Real World of Technology*, Toronto, Anansi.

GLENNIE, J., (1995) *Towards Learner-Centred Distance Education in the Changing South African Context*, keynote address to the Cambridge International Conference on Open and distance learning.

INGLIS, A., LING, P, AND JOOSTEN, (1999) *Delivering Digitally, Managing the Transition to the Knowledge Media*, London, Kogan Page

NOBLE, D., (1998) *Digital Diploma Mills: The Automation of Higher Education*, http://firstmonday.org/issues/issue3_1/noble/index.html

or NOBLE, D. (2001) *Digital Diploma Mills: The Automation of Higher Education*, (publisher)

NONYONGO, E., (2003) *Changing entrenched learner support systems*, in TAIT, A., and MILLS, R., *Rethinking Learner Support in Distance Education*, London, Routledge/Falmer

PENNELLS, J., (2003) Challenges in adjusting to new technology in supporting learners in developing countries, in TAIT, A., and Mills, R., *Rethinking Learner Support in Distance Education*, London, Routledge/Falmer

PERRATON, H. (2000) *Open and distance learning in the Developing World*, London, Routledge.

RYAN, Y, (2001) The *Provision of Learner Support Services Online*, Farrell, G. (2001) *The Changing Face of Virtual Education*, accessed April 03 from http://www.col.org/virtualed/virtual2pdfs

RUMBLE, G (1997) *The costs and economics of Open and distance learning*, London, Kogan Page.

Distance and Open Learning at the University of Education, Winneba

Theophilus Aquinas Ossei-Anto
University of Edmonton, Winneba, Ghana

Introduction

Distance and Open Learning is not new to Ghanaian educators. Foreign-based correspondence colleges were the talk and practice in years gone by. Currently, there are computer and satellite-based programmes being run separately and independently, notably at the universities, in the areas of "Building Technology", "Clinical Pharmacy", "Computer Science", "Distance Learning", "Youth in Development Work", "Humanities Degree", "Business, Commerce and Management", and "Teacher Education".

As a result of economic and political mismanagement of educational policies and practices in Ghana in the 60's, 70's and early 80's, – that led to the brain-drain and dearth of qualified Ghanaian teachers in the classrooms, as well as the near collapse of the entire educational system and management – the concept of distance education at the universities was conceived to meet one of the challenges of the reforms for the tertiary education system, proposed as far back as 1986. Sadly enough, the Ministry of Education did not offer nor set any guidelines for the articulation of distance education mechanisms in the education sector. The universities took advantage of this open gap to claim that they were using distance education (DE) as a means to:

- afford students, especially practising teachers, the opportunity to work and study whilst still at home
- release pressure on residential accommodation for students
- allow adults to divert into other academic areas of interest
- create an off-campus channel
- increase access to university education
- implement cost sharing with individuals and stake-holders
- open up the field for upgrading and updating technical and professional skills and competencies of students, especially teachers in deprived areas
- meet family/job/social/educational commitments simultaneously

Even though there are some serious issues and challenges with the implementation of DE in Ghana some modest chalk marks have been attained including:

- better qualified teachers for the government's Free, Compulsory, Universal, and Basic Education (FCUBE) programme
- In-In-Out programmes at the Teacher Training Colleges
- establishment of DE outfits in the universities
- pick up of computer literacy among university staff
- the production of DE course materials of comparable quality worldwide
- modest DE delivery using print-based materials
- higher admission rates at the universities, especially at the DE outfits

ERRATUM p.132
Theophilus Aquinas Ossei-Anto is from the University of Education, Winneba, Ghana

- television DE programmes in Mathematics and English for students at the basic and secondary school levels – in response to the Presidential Special Initiative on Distance Learning

The current ODL status of UEW

In December 1992, the University College of Education of Winneba (now: University of Education, Winneba) was established under the Provisional National Defence Council (PNDC) Law 221 to prepare quality teachers for service to Ghana, in line with the Government's tertiary education reform programme which was launched in 1988 – and which was linked with the education reforms at the basic (Primary and JSS) and senior secondary school levels.

The Institute of Educational Development and Extension (IEDE) was established as one of the seven academic divisions of the University College in September 1993 to:

- contribute to the understanding and solution of educational development problems in Ghana
- provide training and serve as the extension wing of the University College
- link the University College with other educational institutions and the community generally in Ghana, as well as with the outside world
- implement and coordinate (through a Distance Education Unit) the BEd programme through the design, editing, development, production, management and training for distance education activities
- promote action research in schools to encourage teachers to improve their teaching
- serve as a base for in-service training for teachers and other educational personnel
- act as a resource centre with a core of specialists in in-service training, distance education, school governance, and teaching methodology
- train, advise, and coordinate material writers for the production of teaching/learning material, coordinate local school linkages for experience in methodology courses, teaching practice, and school-community link programmes (such as the Child-School-Community approach)

In effect, IEDE with its programmes became the central academic establishment to give direction and stimulus to the rest of the University College. Additionally, IEDE (which is governed by an Advisory Board, and managed by a Director, two Deputy Directors and an Administrator) has the overriding purpose of developing distance education to enable diploma-holding teachers and teacher trainees to study part-time for a Bachelor of Education degree without undue disruption in their work schedule.

In line with the mission of UEW to serve as a centre of excellence in teacher education, as well as its vision to be seen as a centre for the assemblage of professionally competent intellectuals for the nurturing of teaching and administrative competencies in basic education throughout Africa, IEDE gives priority to its Distance Education Unit, with a primary obligation to develop and support a B. Ed programme by distance for prospective teachers at the Primary, JSS and Teacher Training Colleges.

After years of hard work and preparation, the University's distance education programme was launched in 1996. As a pilot project, the first batch of 196 students was enrolled and inducted in April 1998. Although the target group was supposed to be teachers from training colleges,

other applicants from schools and education offices were enrolled. In December 2001, 147 of the original 196 students went on to the final year, did a final 8 weeks of intensive sandwich programme at Winneba during the summer break, wrote their final examinations in September, 2001, and graduated with the regular students in July, 2002 – with two of them coming out with the first class degree, one as a full-time sitting member of the National Assembly and the other, a woman. Another in the batch is currently pursuing a graduate course at the University of Ghana, Accra. The second batch of 108 students were enrolled and inducted in April 2000. 102 continued and wrote the final examinations in October, 2002 with the view to graduating in March, 2003.

After the admission of the second batch of students into the B. Ed programme, it was observed that the target population had virtually dwindled. It was, therefore, no more cost effective to continue with the post-diploma programme as distance education thrives on numbers. As a result of this, the UEW has shifted the focus of its distance education programmes to upgrading the academic and professional skills of basic schoolteachers whose numerical strength is currently above 90,000. Consequently UEW introduced in February 2002, a three year diploma programme in Basic Education (DBE) with an enrolment of 1,094 candidates and 2632 students in January, 2003. Among these two batches of students are a host of members of the national and district assemblies, traditional rulers and chiefs.

The DBE programme parallels the first two years of a four-year B Ed in Basic Education offered to residential students in the University. This programme seeks to improve the quality of primary and Junior Secondary School (JSS) education in Ghana. It gives emphasis to classroom teaching methodology and other professional studies. Specifically the programme aims at helping the distance students to:

- appreciate and acquire an understanding of the relevance of their course work to their professional activities
- adopt a problem-solving approach to learning and teaching
- use the classroom as the major enrolment for identifying and reflecting on teaching and learning problems, and to devise and evaluate solutions to these problems
- acquire skills related to their everyday work
- develop an understanding of primary and JSS practice

The DBE programme consists of basic school Subjects Studies, Curriculum Studies, Education Studies, Liberal Studies, African Studies, and Information Technology. An important component of the programme is what we call Professional Practice. This has replaced the traditional teaching practice which the on-campus students do. It involves carrying out a series of practical activities related to the professional work of the students. Students are expected to start in the second year and carry it to the third year. During each year the students are expected to focus on a specific area.

IEDE relies predominantly on print materials for its distance education students. This is supplemented by monthly face-to-face sessions. The course books produced by the Institute are very simple, easy to read, very interesting and attractive. Owing to the fact that UEW currently operates the dual mode system, the courses belong to the academic departments per se. Consequently, notwithstanding the inherent difficulties, it is the responsibility of the lecturers in the various academic departments, whose courses are offered under the DE programme, to write the course materials themselves. This is to ensure parity of esteem.

However it is IEDE which coordinates the material development – from editing to importation of graphics/illustrations to final proof-reading to publication.

The slow pace of material development is one of the greatest problems that UEW distance education programme faces. Three main factors account for this. In the first place, as already stated above, the study materials are written by the University lecturers who are full time academic staff of the University combining the writing of DE materials with their normal load of teaching, research, community service, and assessing students. This makes it very difficult for these lecturers to have enough time to write the required materials and/or to meet deadlines. This hampers the smooth pacing of the DE programme.

To speed up the pace of writing, IEDE has introduced what is called retreat or conference writing. By this approach a number of writers are taken away from their busy schedules and camped at a quiet place outside Winneba for about one week during which they concentrate only on the writing of their courses. This approach is yet to yield the desired/significant results.

The second cause of the slow pace of material development is lack of adequate reward for authors of distance education study materials. The lecturers believe that the levels of remuneration for writing these materials are too low. Because of this they easily leave the writing to attend to other higher income ventures. Another motivational issue is the payment of royalties to writers. As at present the lecturers are not too happy with the practice in which once they are paid for writing the materials, such materials automatically become the property of the University. This makes the lecturers get no other further financial rewards by way of royalties. To overcome the problem of lack of motivation, the Institute has proposed some substantial increments in the writing fees, whilst the issue of royalties is still under discussion.

The third factor is that most of the authors do not have access to computers for word processing and so their drafts are handed to the Institute in a hand-written form. Writing and re-writing before getting a neat draft can be time consuming. As a solution to this problem the Vice Chancellor of the University is assisting lecturers to acquire personal computers on hire-purchase. In addition, the University is doing its best to get all necessary help in equipping some departments and the University's ICT centre, housed at the IEDE, with computers and internet facilities.

To support the distance education students, the IEDE has set up Regional Study Centres in different parts of the country. These are where the learners meet their tutors for the monthly face-to-face tutorials and also collect their course books.
These centres are manned by Regional Study Centre Coordinators, and part-time tutors who qualify to teach at the University are employed to give tutorials at the various Study Centres. Assignment turnaround time is one month. This is due to the rather unreliable postal system in Ghana, especially in the rural areas. This means marked assignments are not posted to the students but they are rather given back to the students when they come in to the centres for the next tutorials.

The study centres have not been fully equipped with the needed facilities; they lack such solid infrastructure, and facilities such as office equipment such as tables, desks, telephones, computers, scanners and photocopiers needed for the day-to-day administrative work.

UEW, which is the leading provider of DE in Ghana, operates a highly centralised model of administration of DE. This is because the Regional Study Centres are not fully operational and so all students' records are kept at one place i.e. at IEDE, Winneba.

Distance Education (DE) receives very limited funding in Ghana. Since UEW operates a dual mode system, DE has no separate budgetary allocation. In other words, DE has no line budget. The only provision made for DE is that UEW is given only 2% extra of its total subvention from the Government to support its DE programme, run by the IEDE.

This financial problem is worsened by the fact that the B Ed programme which the University started with was not based on any economic considerations. The programme has therefore not been cost-effective. No proper costing of study materials, day-to-day administration and learner support system was done. The main reason for this situation was that the DE programme was originally meant to upgrade training college tutors rather than to generate income. The DE students were therefore made to pay only token fees which did not cover even half of the cost of production of the study materials. However, under the DBE programme, students are made to pay a more realistic fee to cover a greater percentage of the cost of running the programme.

As at now, the two DE programmes which UEW has run are for professional teachers only. It has no programme for other professionals. The future vision is to reach out to other professionals like nurses, security personnel, pastors and counsellors.

As a first step in this direction, IEDE has designed a three-year diploma programme in Guidance and Counselling which aims at training professional counsellors in all social settings. The programme will be a joint programme between IEDE, the Counselling Centre and the Department of Psychology and Education, all of UEW.

It is also the vision of IEDE to fully use/integrate ICTs and multimedia into its distance education programmes. In this wise, proposals for the modernisation of the Institute have been submitted to the University's Strategic Planning Committee for consideration and approval. It is also the desire of UEW to be a distinctive, innovative university that will operate at the cutting edge of the information and communication technology revolution to meet the educational needs of Ghana in the 21st century and beyond. It intends to employ modern methods and techniques of online distance education delivery in all its courses and programmes to meet challenges of education in Ghana. As the leading distance teaching university in Ghana, UEW – through the IEDE – has the expertise to deliver mass distance education to improve the quality of the workforce in Ghana. What it lacks is financial support and modern technological means (such as ICTs). It is expected that IEDE will be able to diversify its programmes to enable it to generate income to sustain its DE programmes.

The ICT-way forward for the UEW

If UEW is to roll the ball on the green grass of success, then it must engage in a number of initiatives and bold ventures in the domain of ICT enhancements.

Firstly, IEDE must employ ICT-enhanced ODL strategies and UEW must tread the bold path to infuse Information and Communication Technologies into its curriculum. The persistent and pervasive influence that ICT has on organisations has brought about drastic changes in work culture, which have very important implications for higher education. For example, ICT

has influenced the type of skills students in higher education institutions have to develop as well as the facilities and learning modes opened to them. Other far reaching implications that ICT has on higher education are summarised as follows:

- transformation of the management and administration of higher education institutions;
- improving the mechanisms for quality of assurance of learning, teaching and research;
- transforming the degree to which, and the way in which, higher education institutions interact with external organisations;
- the organisation and support of teaching and learning programmes, particularly, the development of educational materials;
- increasing access to quality higher education through Online and Open and distance learning systems.

All UEW academic and administrative staff university teacher should be developed to possess the following expertise:

- knowledge in the use of the relevant educational software packages and IT systems, and the development of instructional and learning material for online delivery
- ability to evaluate the impact of the use of ICT on teaching and learning with a view to devising effective and efficient ways of using ICT resources to achieve learning and instructional objectives.
- in-depth knowledge of where in the curriculum computer applications would be desirable and effective
- appreciation of computers and their influence on social values.

These qualities can be appropriately addressed through electronic transmission of information and interactive computer-based learning environment. ICT usage, as an all-pervasive phenomenon, does not only call for a restructuring of the university's curriculum but it demands that staff change their old ways of managing the business of education, especially distance education delivery methods. The focus should always be specifically on learning with technologies and not learning about technology (Murphy, Anzalone, Bosch & Moulton, 2002).

UEW must move away from merely purchasing hardware and software to an integrated information systems environment that ensures the provision of quality and focused user services for its members (teachers, students, and administrators) and external statutory collaborating bodies. This envisaged academic system calls for the provision of a networked environment. A universal connectivity that ensures that every end-user in a distributed processing site can access information online is very crucial here. This would provide the infrastructure that could serve as the basis for teaching and learning to take place in a multimedia environment. Members of the university community would also build meaningful partnerships among themselves by sharing information resources on the University's LANs and WANs.

The infusion of Information Technology into the university's curriculum is therefore expected to enhance teaching and learning outcomes and improve the management information systems of the University. Technology-mediated learning packages, such as student-centred curriculum and electronic collaboration would be deployed on the network to engage the

learners. This would enhance the levels of interactions of faculty with students, while students have a more personalized learning experience.

Faced with dwindling funding for tertiary education in Ghana, the ever-increasing student population, demand on severely limited resources and the need to address the demands of our distance education programme and the information-based workplace, the objectives of UEW to embark on the building an ICT infrastructure should include the following:

- The infusion of Information Communications Technology into the University Curriculum to enhance teaching and learning outcomes and improve the management information systems of the University;
- The deployment of computer-mediated learning packages on the network to engage the learner in order that the learner may take greater responsibility for his/her learning;
- The provision of ICT facilities and enhanced delivery systems for the University's Distance Education programme in partnership with our collaborators in the telecommunication industry and the African Virtual University. Distance Learning Programmes hold the long term solution to the search of significant members of young people of this country for higher education;
- The use of inter-campus network and the Internet connectivity to provide online services to enhance inter-University (within and outside Ghana) collaboration in the areas of research, shared library and human resources and dissemination of relevant knowledge and information amongst members of the academia of Ghana and elsewhere;
- The adequate preparation of UEW products in Information Communication Technology (ICT) applications in Education in anticipation of the inevitable introduction of computer studies and information-based activities into the pre-tertiary education curricula. The need for teachers at all levels to be computer literate cannot be over emphasized. The introduction of computer Education into all pre-tertiary educational institutions in Ghana is long overdue.

Secondly, UEW products, as teachers for the basic and secondary schools as well as the Teacher Training Colleges, are the key to preparing Ghanaian youth for the information society into which global forces are thrusting us. The necessary computer-literate teachers to implement such necessary innovations in the school system need to be at home with the technology and train appropriately now, before the day of implementation dawns on us. UEW also has a duty to organise ICT workshops, in-service training and short-term courses for Ghanaian teachers to orientate them to face the impending changes in the school curriculum. The University's input to the National ICT Plan for the Accelerated Development of Ghana is very critical. Thus the initiative of UEW in this direction should be viewed as a national one, as the country must make the necessary internal adjustments that must include a broad based educational policy to make ICT accessible to every child. This is a necessity, if Ghana is to successfully face the global pressures created by ICT proliferation.

There is the need for a well-trained system analyst and a core of ICT literate staff to initiate and sustain Information Management System training for all categories of the University staff. Such training could centre on the automation of data storage; retrieval and management; decision support systems; databases for academic registration, payment of fees, and processing of results and transcripts. The need for the Finance Section, Students' Affairs office, the Library, Academic departments and the Registrar's Outfit to collaborate their activities online need not be over emphasized. This would make university administration and

management more effective and efficient. Moreover, what normally seems to be the most successful approach is that successful users of ICT select a mix of technologies, carefully blending them with each chosen according to specific strengths to meet particular challenges (Vanbuel, 2002).

References

MURPHY, P., ANZALONE, S., BOSCH, A., & MOULTON, J. (2002) *Enhancing Learning Opportunities in Africa: Distance Education and Information Communication Technologies for Learning* (Washington, DC, World Bank)

VANBUEL, M. (2000) *Towards a learning organisation: Reviewing technologies for Company*

The changing role of the tutor in Distance Education

Anniekie Nndowiseni Ravhudzulo
University of South Africa, South Africa,

Introduction

The University of South Africa (UNISA) is a public institution dedicated to serving all the people of South Africa and to addressing the needs and challenges of South African society. As the leader in South African distance education provision, UNISA has the unique responsibility for addressing these realities together with its staff and its learners.

The Bureau for Learning Development (BLD) is committed to "provide an enabling environment and leadership through transformative and innovative design, research and development" (BLD vision and mission). Only through teamwork can UNISA realise its vision and actualise its potential to become an institution "where the intellectual life, research and teaching would thrive".

The mission of the BLD is to serve, support and lead staff, learners and other stakeholders in an accountable and transformative way by contributing to, influencing and implementing relevant policies in order to create a supportive culture of reflective practice and lifelong learning towards a better society.

The purpose of the study

The UNISA Tuition Policy stipulates that programs and courses will be taught by means of ODL principles for a team approach to course and programme design, appropriate student support and student-friendly environment. The purpose of this study is focused on the role of the BLD in facilitating the changing role of the tutor in distance education at UNISA. It is also hoped that this paper will help some academics and students to shift their paradigm and to start thinking anew about the implications of the BLD for UNISA.

The conceptualisation of the Bureau for Learning Development (BLD)

The role of the BLD in changing role of the tutor in distance education at UNISA

The BLD has been mandated by the Tuition Policy to facilitate transformation at UNISA. Its role is to ensure that the quality of learning at UNISA is of a sufficiently high standard to facilitate deep learning and societal transformation. According to the UNISA Tuition Policy, the design and development of all materials should happen via course terms. The BLD acts as a change agent among academic staff, departments, and professional and student support functions throughout the university in order to ensure and foster quality teaching and learning. In the context of UNISA, an ODL institution, the BLD has thus a unique opportunity to respond to the call for authentic, high quality, effective learning.

The services offered by the BLD to academic departments relate to print–based learning development, staff development, online learning development, research and development, and project team management. During learning material development, the BLD brings in learners

and critical readers to evaluate learning materials. In the light of the above, it is the aim of this paper to touch firstly on the complex nature of the core business of the four legs of the BLD and the impact on faculties; secondly, to discuss the finding from students and educators; and lastly, to propose certain guidelines for a better understanding of the role of the BLD. The following is a brief discussion of services offered by the BLD:

Print-based learning development

The BLD's involvement in print–based learning development is a negotiable process, which produces the best results if academics seek BLD support right from the start of planning new courses. The BLD, however, also concerns itself with the vision of existing courses and compiling 101 tutorial letters and, to a lesser extent, 501 tutorial letters. The BLD assists academic staff members with their workload by setting up professional teams involved in all elements of learning, for example, layout, graphic design and learning design (including aspects such as designing outcomes, learning activities and appropriate assessments).

To promote quality assurance, a number of instruments have been introduced and they are in the process of being adapted to the design and development process by Learning Developers. These include macro design, SAQA template, course outline instrument and course evaluation.

Staff development

The function of the BLD staff development is aimed at the staff development needs of academics. However, academic departments may approach the BLD at any time with special requests. The BLD conducts research as far as possible on the topic in demand and thus addresses the needs of the academic departments.

As an example here, the BLD staff development section organised and facilitated two staff development training sessions after the BLD was approached by the Department of Applied Accountancy to run a training session for staff in the department. Required skills were articulated as presentation skills for the extensive face–to-face support offered to CTA students (CTA Staff Development Report 2002). A needs analysis was done through interviews with the three staff members including the HOD. The broad needs were identified as follows:

- preparing and presenting lectures of between 4 and 6 hours for between 40 and 400 CTA students, most of whom work in course-related jobs; all of whom have a heavy workload in terms of study material
- dealing effectively with students of different ability levels in the same presentation

The other session took place after the BLD was approached by the CIMSTE Department to help them with the "ins and outs of distance education". The CIMSTE workshop represents the second pilot in the staff development plan. This workshop was planned and facilitated by the coordinator and facilitators. After the needs analysis had been carried out with the department, it was established that they needed the following support:

- evaluating existing study guides for Maths, Chemistry, Biology and Physics (at certificate level for teacher upgrading) written by outside consultants

- designing and writing the second set of materials for these subjects for the target group, as well as Masters' level courses currently being developed and run (CIMSTE Staff Development Report 2002).

The use of the brief and focused needs analysis has proved to be crucial for effective workshopping, as was seen with the CTA workshop. The needs analysis takes the form of an informal discussion including focused questions and then noting the responses.

Online learning development

According to Heydenrych (2002:3), on 7 December 2002 the Executive Committee approved the full online delivery of IOP377-J Human Capacity Development as a pilot project requiring feedback on the success of full online delivery. IOP377-J Human Capacity Development, Department of Industrial Psychology, Faculty of Economic and Management Sciences was selected for this pilot delivery owing to its expected ability to attract a different audience. In addition, the new learning experience for adult learners was aimed at empowering and engaging the learner.

The Online Learning Developer (Systems integration/Research) conducted a research on "automated assessment" and argued that as student numbers and lecturer workloads increase, traditional methods of assessment make it difficult to undertake effective assessment and provide students with in-depth, relevant, specific and speedy feedback. In his paper presented on 25 April 2003, discusses the rationale for developing computer-based assessment and then analyses pertinent issues such as types of computer automated assessment (CAA) and the advantages of adopting CAA within the higher education sector.

Research and development

Research at the BLD contributes to education provision that not only responds to but also shapes the changing circumstances of our society. The BLD research activities promote scholarship in the field of ODL and related topics, pursue issues of institutional and national interest, build professional capacity and reflexive practice, enrich tuition and foster a culture of collaborative knowledge creation and sharing. Current collaborative research initiatives include the following:

- investigating the implications of the team approach to learning design in the Department of Mercantile Law
- developing guidelines for course development and writing for the Department of Industrial Psychology
- looking at the systemic conditions required for a more effective semester-based mode of tuition
- preparing various joint research articles and conference presentations based on lecturers' interactions with the BLD, such as the video-conferencing experiences in the departments of English and Advanced Nursing Science

Project Team Management

In a well-organised ODL, the course, rather than the educator, provides an appropriate learning environment for students. Rather than simply referring to a set of materials, however, the course is the structure of learning that is designed into the materials.

The BLD project team manager argues that ODL demands the inclusion of many more aspects into learning design than just compiling a study guide containing factual information only. He further indicated that ODL warrants the involvement of all the different support departments in the university. This includes aspects such as learning development, editorial, production, assignments, examinations, student support, graphic support, library services, despatch, etc.

Data collection strategies

Data was collected by means of focus group interviews (Folch-Lyon & Frost 1981; Kruger 1994; Kvale 1996), which according to Shurink, Shurink & Poggenpoel (in De Vos 1998) can be described as "a purposive discussion of a specific topic or related topics taking place between individuals with a similar background and common interests".

The role of the researcher was that of a "research instrument" with no preconceived notions or expectations (Du Toit 1997; De Vos 1998). Two researchers participated in the research, referred to as the moderator and the observer, one being the facilitator of the discussion and the other taking field notes in order to accomplish triangulation (Vockell & Asher 1995).

One open-ended research question was put to the respondents (educators and students) to gather information on the topic:

Educators: *What are your views on the role of the BLD regarding learning material development?*

Students: W*hat are your views regarding student support for you to complete your course satisfactorily?*

A context was created in which the respondents could speak freely and openly. This was realised by the following techniques: clarification, paraphrasing, summarising, probing and minimal verbal as well as non-verbal responses. During interviews bracketing (putting preconceived ideas aside) was done. The research continued for four focus group interviews until definite patterns or themes become evident and the information became saturated (De Vos 1998; Morse 1994).

Field notes (Wilson 1998) were kept by the research assistant during the interviews.

Data analysis

All the interviews were recorded by means of an audiotape and then meticulously transcribed while a simple coding system was used to identify topics or recurring themes. The transcribed focus group data were analysed by using the constant comparative method of data analysis as described by Maykut and Morehouse (1994). The following steps were implemented: after repeatedly reading the transcriptions in order to form a holistic understanding, the main ideas that emerged from the data were written down in a process of discovery to be used in the provisionally identified categories. Next, units of meaning were identified and indicated on the data source. The units were then compared to the provisional categories to see whether they fitted in any of them.

This process was repeated with all the data. Where there were no provisionally identified categories to match units of meaning, new categories were developed. The emerging categories were then further refined by writing rules of inclusion to convey the meaning of the data contained under a category.

Findings of the study

The following main constituents or themes recurred in the focus group interviews.

Findings pertaining to the students

The appeal for more learner support was evident. It is obviously an issue of great importance for the students. The following is an example of a contradictory response:

> Difficulty I have about materials is that they are not rich with examples and exercise. They gave few simple examples and on challenging chapters they even do the same.

The student's response shows dissatisfaction with the *quantity as well as the quality of examples and exercises* in course material.

A major complaint was that the materials did not offer enough guidance. The following responses are a reflection:

> I sometimes find it difficult to understand because you'll find that the materials are not easily understandable. I should think it would be fruitful if they arrange classes as frequently as they can if not full-time tutoring ... you find a study guide as it is and then you start reading it on your own. No one is going to advise you on how to go through that guide.

Guidance for the students means, for example, "classes", "advice", "group discussion", "someone to clarify", "guidance from lecturers and other source". There is an indication that the material is insufficiently scaffolded; in the words of one student, "you find the guide as it is" – that is, without any form of support (e.g. guidelines, examples, illustrations and language support).

These comments seem to reflect a desire for a much more flexible set of learning opportunities designed to meet the needs of the learners. The majority of students were positive about their course materials, although some were contradictory or negative. Research into learners and their needs is a high priority in the organisation, and is used to inform all aspects of policy.

Learner information is used to design programmes, courses, materials, learner support and counselling services that are flexible and learner centred. Supplementary materials and learner support are provided according to the needs of learners in relation to language and learning experience. If learners are to adapt to the special requirements of guided self-study, they require various forms of support, for example, satisfactory access to tutors and facilitators, opportunity to interact with other learners and access to the necessary facilities. However, responses to the interview questions give a clear indication that the type of learner support desired by students is a greater degree of contact with their tutors and lecturers.

Findings pertaining to the educators

Generally, the most important reason why the educator's perspective may be negative is that educators often feel obliged to implement policies about which they often do not have a clear understanding of the demands of changes they must implement and often lack adequate time to prepare for the implementation.

The majority of the educators indicated that they lack confidence in their own abilities to implement OBE principles. Moreover, their perspectives are also influenced by past experience using the same study guides for three to five years without revision and lack of the contribution that students can make to the delivery of courses, particularly to facilitate peer group discussion.

However, the challenges facing many of the UNISA faculties are that there is a lot of work to be done regarding the revision of courses, and meeting deadlines for scheduling with limited staff.

It is in the light of this that certain guidelines and recommendations will be made. These being that

- making content relevant for students starts with simple things such as: developing concept maps to show how the things you are teaching are interrelated; looking for real-world applications of the concept and procedures you are teaching; talking to other educators to find ways of integrating knowledge across course boundaries; and continually asking yourself "why do I want students to learn these things?"
- instructional activities should be arranged so that students have appropriate opportunities to engage in meaningful learning as opposed to rote learning

Tutors should ensure that students know what important outcomes they are required to achieve and how the quality of their performance will be judged.

We can make text accessible in several ways: acknowledging learners' prior learning and experience through advance organisers, using interactive text and activities, providing pre-tests and post-tests to help them gain a realistic picture of their own learning, using various types of presentation to reach learners with different learning styles, opening up access to the text by using glossaries and margin comments and notes.

This will often involve the use of teaching strategies such as individual research projects that students design.

Concluding remarks

When looking at this scenario, the role of the BLD at UNISA, in spite of some negative viewpoints regarding learning materials development, student support, it is evident from responses educators and students made during the focus group interviews that there are some concerns about the quality of ODL they are receiving. The purpose of this paper was to indicate the importance of the role of BLD in facilitating changing role of the tutor in distance education at UNISA. What has transpired is that all of these techniques are aimed at creating opportunities for learners to understand and learn the material.

In conclusion, the large number of courses at UNISA share the following characteristics:

- content driven
- very little reflection and metacognition
- not always contextually relevant
- learner support is seen as an add on and is not embedded in the design of the learning experience.

References

DE VOS, AS (ed). (1998). *Research at grass roots*. Pretoria: JL Van Schaik Publishers.

DU TOIT, Z. (1997). Begeleiding aan ouers van kinders met Aspergersindroom. Ongepubliseerde Med-skipsie. Johannesburg: RAU.

FOLCH-LYON, E & FROST, JF. (1981). Conducting focus group sessions. *Studies in Family Planning,* 12:443-449.

HEYDENRYCH, JF. (2002). A report to the Senate of UNISA (IOP377-J: Human Capacity Development).

KRUGER, RA. (1994). *Focus group: a practical guide for applied research*. California: Sage.

KVALE, S. (1996). *Interviews: an introduction to qualitative research interviewing.* London: Sage.

MAYKUT, P & MOREHOUSE, R. (1994). *Beginning qualitative research: a philosophical and practical guide.* London: The Falmer Press.

MORSE, JM. (1994). *Critical issues in qualitative research methods*. Thousand Oaks, California: Sage.

VOCKELL, ED & ASHER, JW. (1995). *Educational Research.* Englewood Cliffs, New Jersey NJ: Prentice-Hall.

WILSON, HS. (1989). *Research in nursing*. California: Addison-Wesley.

The future of Open and Distance Learning – will we go on failing our students?

Ormond Simpson
The Open University in the East of England, UK

Introduction – the case for retention

Student dropout often seems to be the unmentioned spectre of the feast at conferences like this one. It doesn't appear anywhere on the topics suggested - even by proxy. And yet it is fundamental to everything we do and are. If we're not about producing successful students then what are we for? Of course colleagues will immediately start to philosophise about what we mean by a 'successful student'. But I wonder if that's not occasionally a form of defensiveness? I've no doubt by what I mean by a successful student – it's someone who gets where they want to be. I suspect (in the absence of contrary evidence) that in the overwhelming majority of cases that's completing a course successfully – finishing the course and getting the qualification at the end.

I think that we're failing too many of our students in distance education - current retention rates in ODL which are historically lower than in other forms of education appear in many cases to be falling further. And online learning which was to be the great saviour of distance education appears in may cases to have even lower retention rates. This is true even in the home of online learning in the US: a recent study there suggested that the dropout rate from online courses was 70% or more (Corporate University XChange, 2002). Sometimes when I'm at a conference like this discussing quality thinking, knowledge management, personalising student support and so on it feels rather like listening to a football manager who's busy discussing ball-turf interactions forgetting that the whole point is to score goals.

Of course until comparatively recently there was the wide spread belief that retention rates were largely beyond the influence of ODL institutions. Martinez (2001) quotes an HMI [the chief educational inspection authority for the UK] report from 1991 which concluded that drop-out in further education was largely due to factors external to colleges with the implication that such dropout was beyond the colleges' control. Similar attitudes were prevalent in ODL with the assumption that it was sufficient to offer quality teaching support to students. Those students who did not take up the offer were those less likely to be motivated and therefore likely to drop-out anyway.

Such assumptions may still be deeply embedded amongst staff in ODL. The author was in a recent meeting of a group concerned with inducting new students. There was a discussion amongst staff about the use of various course choice materials which were offered to students. It was noted with approval that 40% of the students responded to ask for them. The suggestion that all students should be sent the materials whether they asked for them or not was met with some scepticism - 'Offering them the materials' someone said, 'gives them a chance to engage with the idea of study as a serious business.' This I realised was the old attitude in slightly new guise. The implicit judgement was still that there were students who were destined to withdraw anyway and that all we were doing was to operate a kind of 'triage' – the process by which casualties on the battlefield are deemed to worth treating or not.

There seem to have been few attempts to challenge this almost subconscious assumption where it exists or to assess what the influence of an educational institution might be on the retention of its students and what the maximum possible increases in retention might be through institutional action. Or to put it another way it is not clear what the level of 'institutionally avoidable withdrawal' might be in any institution.

The changing environment

But the environment is changing. There is increasing interest in student retention in online open and distance education. There are a variety of reasons including:

- Government policies on widening participation which, as there are clear links between lower entry qualifications and dropout, are likely to mean that retention rates will fall unless compensating actions are taken,
- Government funding for higher education which are now clearly and directly linked to retention. It is one of the contentions of this paper that in fact such funding regimes offer institutions financial possibilities which should be exploited.
- Government strategies for increasing quality in higher education in the UK which will be relying on the publication of student feedback and success rates,
- Increased competition between institutions. When some 25 years ago I joined the OU UK in the town in which I lived it was the only choice for someone who had to study at a distance. Now it is possible to take degree level courses through a local university, a local college which has a franchise from another university and several online providers.
- Increasing student assertiveness about their needs. Whilst this can only be a subjective some commentators believe that perhaps as a result of students paying more of the costs of their learning they have become more demanding in terms of what they expect from institutions.

Some years ago I referred to what I called 'the washing machine syndrome' in education – that is when your washing machine goes wrong you tend to blame the manufacturers but that when you failed an educational course you tended to blame yourself. If this tendency really existed at that time it seems much less prevalent these days when a great deal is riding on success in higher education. It has recently been calculated that the value of a degree is at least £220,000 in increased income over a working life (Times Higher Education Supplement 15/3/2003) and it has been found in the US that graduates have higher levels of satisfaction with their lives, increased health and life expectancy. With so much riding on completing higher education it may not be surprising that students may be demanding a better chance of success.

Institutionally avoidable dropout – the maximum possible increase in retention

If the contention of this paper is that retention can be increased then it is clearly time to put money next to mouth and say by how much I believe retention could be increased by institutional action.

In fact there are various ways in which it is possible to estimate avoidable dropout – asking students might be one way although there are obvious difficulties. There are other ways

which will be the subject of a future paper but the simplest is probably to look at the characteristics of dropout in any institution. For example figure 1 shows the relationship between dropout and previous educational qualification [peq] in the OU UK:

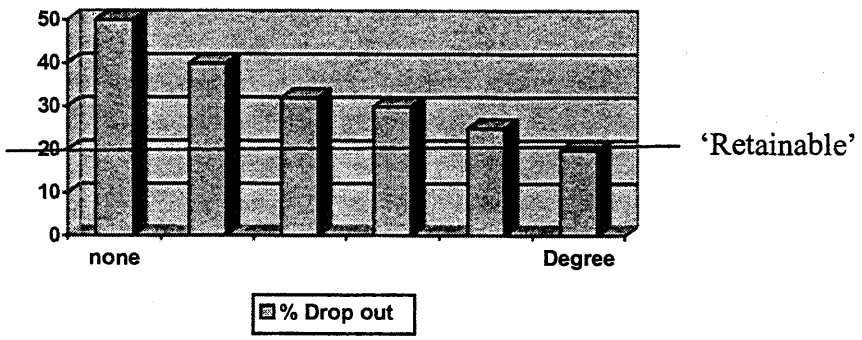


Figure 1 Dropout versus previous educational qualification in the OU UK

If we assume that students entering with a previous degree are academically equipped to study successfully [there may be some exceptions such as for example students switching from arts subjects to maths-based subjects] then their 20% dropout should represent the basic dropout due to illness, domestic problems, and so on – that is the institutionally unavoidable dropout. If we further assume that this level is the same for all the other peq groups then the number of students above the 'retainable' line should represent the number of students who withdraw for academic reasons – that is the 'institutionally avoidable dropout' or 'maximum possible retention rate'. Because the number of students entering at different peq's is different this represents about 7% of students in the OU UK. It will of course be different for different institutions, especially those who have entry qualifications.

The maximum possible retention rate is only an order of magnitude estimate but it does at least suggest what institutions should be aiming at and how far they are successful. For example a retention activity that increases retention by 3% may not sound very effective but in the case of the OU UK it represents about 45% of the maximum possible.

How can retention be increased?

If then retention is held to be important how may it be increased? There are two obvious possible approaches – through course design and student support.

Retention through course design

There seems to have been surprisingly little research into the links between course design – content, structure, assessment strategies and so on and the retention rates on those courses. What there is can be hard to evaluate as it does not involve the use of controlled situations. Woodley and Parlett (1983) looked at the dropout rates on different OU UK courses and showed that course with low retention rates had certain characteristics. For example they had no residential school, were half credit (they went at half the pace of full credit courses), had been presented for several years, had few TV and radio programmes, few students and few set text books over and above the course units.
But it is not possible to draw clear conclusions from this as the student base for different courses are not the necessarily the same. For example courses with Summer Schools might

attract students who had both the time and resource to spend on such courses and be more likely to succeed anyway.

Clearer lessons may possibly be drawn from course assessment strategies. For example the OU UK science foundation course recently changed in version S102 from a summative first assignment [an assignment counted for final assessment] to a formative assignment [used for feedback only] in version S103. The percentage of students submitting that assignment increased from 65% to 72% [Simpson, 2003 adapted from Burt, 2002] – see figures 2 and 3 which increase appeared to carry on through the subsequent assignments.

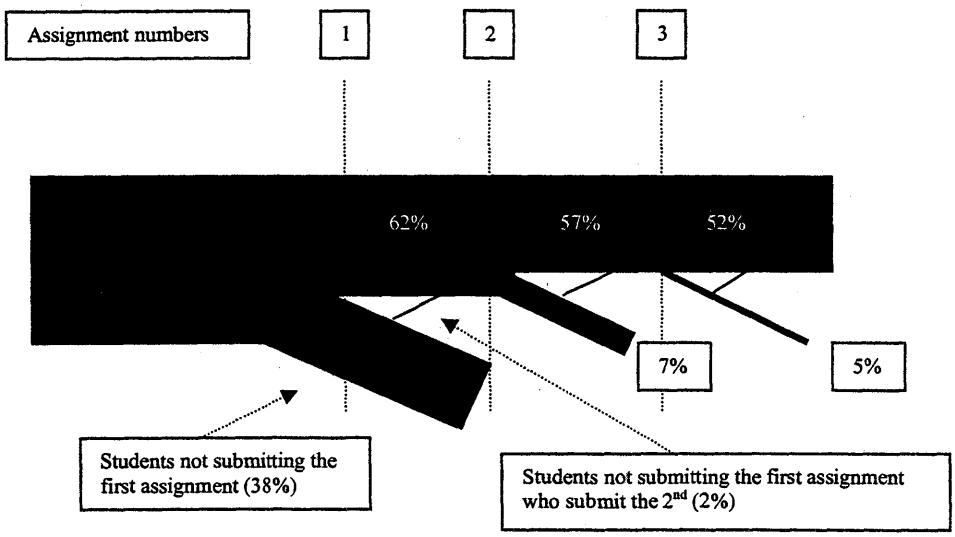


Figure 2 Assignment submission rates on OU UK course S102 with a summative first assignment

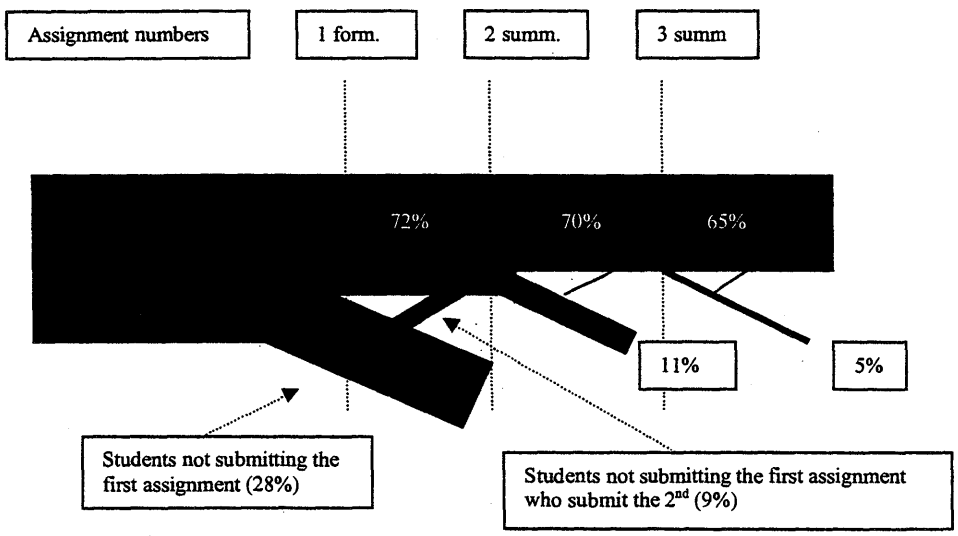


Figure 3 Assignment submission rates on OU UK course S102 with a formative first assignment

Unfortunately the exam strategy was changed at the same time making it impossible to compare the final pass rates on the two courses.

Another possible course characteristic that may be connected to retention is the reading level required to study the course. Datta and Macdonald (2002) showed the reading skills of new students on certain courses were apparently below the level required to study those courses. Essentially the students were at tabloid newspaper level and the courses were written at broad-sheet level. However no work has yet been done to show that there is a link between that finding and subsequent retention.

But changes that improve retention on a course will always be open to the criticism that the course has simply been made easier – witness the annual rite in the UK of complaining that standards have fallen whenever public exam pass rates rise. It may be safer therefore to use student support to increase retention rates if that is possible.

Retention through student support

The range of activities and materials that can be offered as student support [including tuition] is very wide. But there are several problems in establishing clear retentive effects for any activity.

- 'Unevaluatable' activities. Some activities will be very hard to evaluate for retention effects. For example inappropriate course choice is a clear cause for withdrawal in full time higher education and certainly OU UK students give it as the second most important cause of dissatisfaction. Thus a certain amount of effort has gone into providing clear course choice advice and materials such as course preview packs and students' comments on courses and so on. But it is hard to construct an experiment [or at least an ethical experiment] that clearly demonstrates the retention effects of such activities and materials.
- Self selection amongst students. Another difficulty is that any retention activity that is offered to students and not compulsory will be experienced only by students who choose to take up the offer. For example one of the highest retention effects in this author's experience occurred as a result of the mentoring of new students by experienced students (Asbee, Simpson and Woodall, 1999). However since it was not possible to force mentors on to new students the students who experienced mentoring were a self-selected group and possibly not representative of new students as a whole.

Thus it is difficult to establish clear retention effects for a whole range of activities which nevertheless will probably still be worth doing especially if they are relatively low cost. A simple example here is derived from the finding (Asbee and Simpson, 2000) that the most important form of support to students is from their family and friends. It may be very worthwhile attempting to enhance that support (by for example providing a web page for families and friends as the UkeU will do shortly). However again it is very difficult to devise an experiment that will demonstrate the retention value of such an exercise.

Thus the only activities in which it is possible to demonstrate clear retention effects are those in which it is possible to have control groups and which reach all students not just a self-selected group. This in effect probably restricts the assessment to 'pro-active' contacts of one kind or another; that is, contacts from the institution or its tutors to students. This is distinct

from reactive contacts which are to the institution or tutors from students. These are inevitably self-selected.

Retention through proactive contact

There is a long history of research into proactive contacts with students going back to Rekkedal (1982) who sent 'encouraging' postcards to students to keep them progressing and found a subsequent increase in retention of 46%. Another example is due to Visser (1998) who used a model of motivation due to Keller (1987) to develop a 'Motivational Messaging Support System' which she claimed increased retention in her study from 34% to 61%.

Both these studies involved postal methods and were both with a relatively small number of students. Peoples and Simpson (2001) scaled up the activity and used the phone with a much larger group of OU UK students (about 800) together with a control group of similar size. The contact was a short phone call from an adviser at before the course start date - that is before a tutor was in a position to make a contact.

Because of the nature of the contact it was possible to establish if there was a retention effect by comparison between the experimental and control groups which were carefully chosen to have very similar characteristics. In fact the experimental group showed a 3% increase in retention over the control group. If replicable this is a very interesting result and a surprising one for a 10 minute call at the beginning of a 9 month course.

It was also possible to keep a check on the costs which was important. The cost of each call was about £6 ($/euro10) so that the total cost of contacting 100 students would have been £500. In that 100 students an extra 3 would have been retained so the cost per extra student retained was £500/3 = £160. This sounds rather a lot but in the case of the OU UK it actually represents a profit to the institution. This is because of two factors:

1. The need to recruit new students to replace the ones who dropout in order to at least maintain a steady state. In a paper to be published Simpson (2003) estimates that this amount is of the order of about £200 ($/euro330).
2. The OU UK government grant is based on the number of students who are retained to the end of the course. This is currently about £1100 ($/euro1850).

Thus the net gain to the OU UK (savings on recruitment costs and extra grant income) due to an extra student retained is around £1300 ($/euro2300). Set against an cost of £160 per student retained this represents a 'profit' to the institution of around £(1300-160) = £1140 ($/euro1900) per student retained.

If the results of this exercise were repeated over the entire new student population (30,000) of the OU UK each year then the cost would be £(30,000x6) = £180,000. But this would increase retention by 3% of 30,000 = 900 students which would generate a net 'profit' to the institution of £(900x1140) = £1,026,000 ($/euro1,700,000).
Thus in this case the retention activity would not only be self funding but would actually generate a substantial profit to the institution. Of course other institutions would have different financial circumstances but it is likely that in many cases there would be similar results.

Conclusion

Work is under way to repeat this activity. When dealing with relatively small percentage changes in quantities it hard to ensure that the results are significant and it may be that it is necessary to undertake several more contacts in the course of a period of study in order to ensure a given level of retention. But the data above suggests that more contacts are affordable before the 'profit' is endangered.

Of course increasing student retention is not just an important activity in terms of the profits to the institution but represents a human benefit as well. As Fred Lockwood (2003) writes:

> Whenever I think about these students [students who dropped out from a university he had worked for] the hairs on the back of my neck start to stand up! They had worked long and hard to save the money to pay for their course. They had steeled themselves to take the decision to register as part time students of the university. It was evident that many of them had told their husbands and wives, parents and children neighbours and work colleagues that they were about to study with a university. A few short weeks after they were telling the same people that they 'stupid', 'couldn't cope', hadn't got it', 'found it difficult'- they had dropped out. I can only guess at the impact this experience would have had on their self-esteem and to the likelihood of further study.

Isn't it time we stopped failing our students in distance learning unnecessarily and gave them all a better chance?

References

Some of the material in this paper is adapted from

SIMPSON, O. (2003) Student Retention in Online. Open and distance learning, Kogan Page, London.

Other references

ASBEE, S AND SIMPSON, O (1998) Partners, families and friends: student support of the closest kind, *Open Learning*, **13** (3), p 56

ASBEE, S, SIMPSON, O AND WOODALL, S (1999) Student – student mentoring in distance education, *British Journal of Access and Credit Studies*, **2** (2)

BURT, G. (2002) Applying mathematical sociology in institutional research in higher education; evolving populations in evolving environments, *Paper presente the joint Japan - North American conference on mathematical sociology, Vancouver.*

MARTINEZ, P. (2001) 'Improving student retention and achievement –what we do know and what we need to find out' *UK Learning and Skills Development Agency, London, www.lsda.org.uk*

DATTA, S. MACDONALD ROSS, M. (2002) Reading skills and reading habits: a study of new Open University undergraduate reservees, *Open Learning* 17 (1) p69-88

LOCKWOOD, F. in Simpson, O. (2003) Student Retention in Online, Open and Distance Learning, Kogan Page, London

PEOPLES, R. SIMPSON, O. (2003, unpublished) The Early Contact Project, Open University in the East of England.

CORPORATE UNIVERSITY XCHANGE, (2002), *Open Learning Today* **61** July.

REKKEDAL, T. (1982), The drop-out problem and what to do about it, in Daniel, J. Stroud, M. Thompson, J. [ed] *Learning at a distance – a world perspective.*

VISSER, L. (1998) 'The Development of Motivational Communication in Distance Education Support' *University of Twente, Enschede, Netherlands.*

WOODLEY, A. AND PARLETT, M. (1983) Student drop-out. *Teaching at a Distance* **24** 2-23.

The commoditisation of Higher Education & the e-learning revolution

Ian Walcott
MJM Management Systems Inc., Barbados, West Indies

Overview

For the purposes of this paper, higher education will be defined as post-secondary school education or tertiary education. This is very important because as we witness the globalization of education, then it becomes imperative to define levels and standards, for what may be considered secondary in one country may very well be tertiary in another.

In addition, we will make a distinction between academic, professional and vocational types of training and education. Though most universities in the USA and indeed Britain have long seized the opportunity to widen their scope by providing professional training through their 'extra-mural' departments, the university at large is still seen as a seat of academia. Professional and vocational training has been taken up by other educational institutions or training providers. What is more important is that since the grand explosion of the Internet, there is now looming on the horizon, the further commoditisation of higher education.

Indeed we say further commoditisation since the process has long started with most institutions using similar systems, organisational structures and operational procedures. This was fuelled by international exchange programs and the need for mutual recognition of certification. This paper posits the idea that in coming years, we will witness rapid commoditisation of higher education as we move towards electronic learning (e-learning). This will occur for the following reasons:

- Technology has an in-built tendency to move toward commoditisation as it advances and confronts competition. Example of this can be seen with the computer, the photo copier and the camera where digitization led to rapid commoditisation. Another example is in the software industry where even though there may be a few dominant players, all new comers tend to make their products follow similar user-friendly interfaces as those of the dominant player.
- The above examples have linked commoditisation to standardization and this is a natural corollary of the process. In other words, e-learning platforms will soon become very stanardised as the e-learner comes to expect graphical interfaces that are user-friendly, common and intuitive. Indeed this is the standard set by Microsoft products and e-learning providers will have to follow suit since most of their e-learners are already using the intuitive Microsoft product line for most of their every needs.
- The Dot-com industry has also taught us that the early bird catches the worm and just as Amazon.com has become the leading online bookstore of choice due to its early arrival, we can almost predict that a similar phenomenon will occur with e-learning providers.
- As the e-learning industry consolidates and dominant players emerge, there will be further commoditisation as colleges, universities and other providers of higher education start to outsource their e-learning, as an alternative option to expensive in-house research, development and deployment.

The paper is broken down into three sections. Firstly we will examine what is commoditisation and why it occurs. Secondly, we will look at the driving factors behind e-learning and finally, we examine the opportunities and threats of commoditisation as well as recommendations for the e-learner and others committed to lifelong learning.

1) What is commoditisation and why it occurs?

According the **Cambridge Advanced Learner's Dictionary**, a commodity is "a substance or product that can be traded, bought or sold." Commoditisation, therefore, is simply the process of becoming a commodity. It is the outcome of the product cycle that evolves from exclusivity to mass production and trade under market conditions.

To understand this process, one has to see a product transformed from its origins in a niche market into a commodity available to consumers in a wider less exclusive market. At the niche market stage, the product is defined by its uniqueness, customization, relative exclusivity and qualities of differentiation. This creates an advantage and often leads the producer to demand a high price.

However, as demand for the product increases and the producer is unable to meet the exigencies of the growing consumer base, new competitors emerge with similar products and drive the price downward forcing the dominant player to respond with a similar strategy which eventually undermines the niche market and leads to mass production and eventual standardization of the product.

Commoditisation therefore is characterized by the following shifts:

- From Niche Market - to – Wider Consumer's Market
- Price set by producer – to – price set by market forces
- Uniqueness and customization – to – standardization

In the education industry, this has occurred at three levels:

1. Universities were mainly located in Europe, then the USA but as worldwide demand increased, we saw the emergence of universities worldwide. Though this process occurred over several centuries it nonetheless represents a good example of the commoditisation of the traditional university education. We refer to this first level as *institutional commoditisation.*
2. The second level is *product commoditisation* and the best example of this is the Masters in Business Administration. In fact, there are still many people who fail to realise that this is what the acronym **MBA** stands for. The MBA is by far an American invention, then quickly spreading to the UK, Europe and now rapidly expands across the globe, (even offered by non-university providers) as a hot selling education product.
3. The third level refers to the *commoditisation of methodology*. This methodology often times revolves around the learning and teaching - methods of delivery and assimilation. Again we cannot help but draw on the MBA as an example, where most basic curricula are fairly standard and the Case Study Method has become as commonplace as the MBA itself.

The use of technology in the classroom to assist both the teacher/trainer and the learner is also another good example of features and outcomes of commoditisation. This can be seen in the use of multimedia, the Internet and other such technological advancements.

In the examples above and the figure below one will notice that the three forms of commoditisation occurred at different rates and speeds. Where institutional commoditisation took centuries, the example of the MBA occurred in less than 100 years. Implicit in this argument is that the third level of commoditisation of methodology will occur even faster as it is driven by technology, globalization and increasing teacher and student exchange programs and agreements between educational institutions. This is exactly where the e-learning revolution is situated - at the third level of commoditisation.

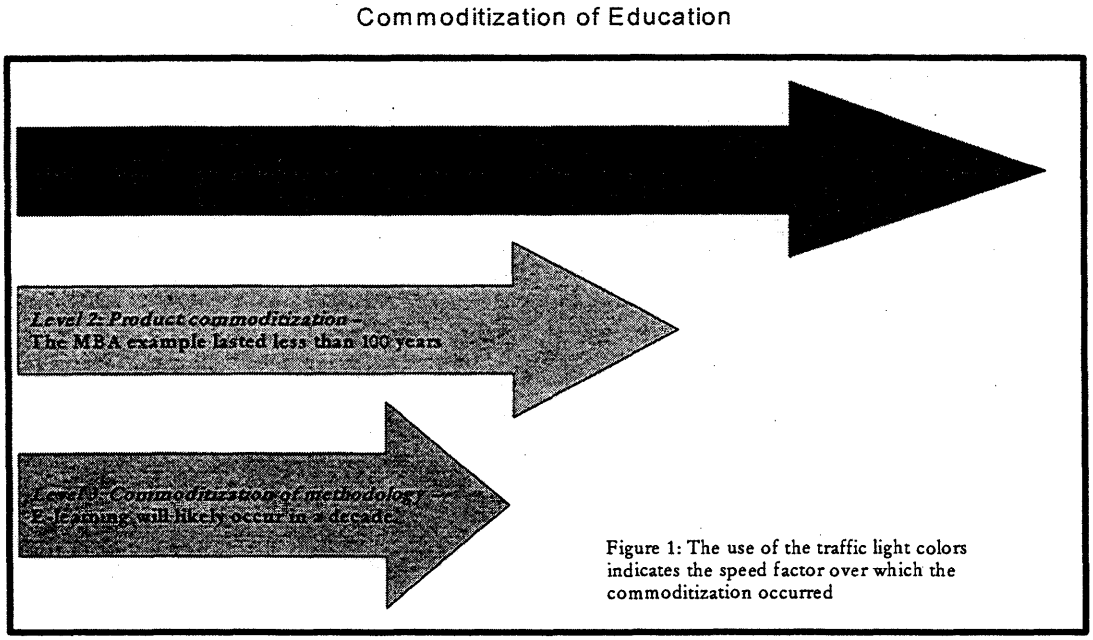


Figure 1: The use of the traffic light colors indicates the speed factor over which the commoditization occurred

The driving factors behind e-learning

It is ironic that the educational world is now playing 'catch-up' with the Internet since this is where it was most widely used in the 'early days'. In fact, in the 80s and early 90s, before the advent of the Super Information Highway, as it was then called, the earlier models of Email, online chat rooms and search engines were in the domain of universities. Now as we evolve to e-learning platforms, we find that education providers are seeking third parties for their solutions. In many instances the new solution providers are distant from education, though they specialize in technology and software development. What therefore are the real driving forces behind the e-learning revolution?

Firstly, the fallout of the Dot-com industry has left many talented developers and IT scientists looking for new channels to direct their intellectual energy. Secondly, the fact that American education is largely a private capitalist endeavour, e-learning represents an excellent opportunity to find new markets and accommodate the increasing demand for education without having to build more campuses. Thirdly, the globalization factor in education is a major force behind e-learning. We will focus more attention on this last aspect.

Internet technology has been a major force contributing to globalizing education. A student residing outside the USA on vacation from his college can now virtually stay in contact with his or her professors, library and campus life. As natural as this may appear to the average teenager, this was not possible 20 years ago. In addition, with online stores, the student can now order books and other school supplies without leaving his/her home country. It is not difficult to imagine, an education provider having Amazon.com ship text books via FedEx to a student in West Africa who is pursuing a course offered by a French university online.

As a result there are two important dynamics at play. The international student is now *pulling* products from leading education providers and the educational provider in turn is *pushing* more product-offering at the student. This interplay of demand and supply will help drive e-learning to the point of commoditisation, where the 'e' in e-learning will disappear as it becomes the norm. It is suggested here that this process will occur at a much faster rate than the product commoditisation. In fact, it is largely because most of the product commoditisation has already taken place that e-learning programmes will propagate at a much faster rate.

However, a warning must be issued. The higher education customer is perhaps one of the most discerning and demanding as the product is directly linked, more often than not, to upward social mobility, job promotion, international recognition and worldwide mobility. This has a number of implications at this early stage of e-learning development.

(i) The 'resale' value of the education product in the Digital Age still remains one of the more important deciding factors on the part of the customer. The higher education customer will demand the following:

- An internationally recognised brand: for example, if the student wants to seek IT certification, he or she will feel more comfortable with a Microsoft brand than an unknown brand. The best and most popular brands will still have the highest demand. This leads us to the quality issue.
- Quality: Education quality will always be a deciding factor. Product delivery, content: faculty/trainer qualification and support cannot be overlooked. The education customer demands the highest quality and in many instances will pay extra for it.
- Reliability and trust: the fallout of the Dot-com industry is still fresh on our minds, hence the trust factor in the education provider is paramount. The customer will want to know that the institution outside the virtual world still has a physical presence, at least in these early days. It can be very displeasing to discover that our education provider simply went out of business overnight. Nonetheless, it is not difficult to imagine a futuristic world with virtual education providers drawing tutors from all corners of the globe.

(ii) Maintaining high admission, academic standards and controls with the necessary checks and balances is still very important.

- How do you verify that a student is actually performing their homework and assignments independently?
- How do you know that the person in front the computer terminal sitting an examination is really who they say they are?

We can think of dozens of questions like these that can potentially undermine the credibility of the education provider. Though this fear seems logical, the nature of the education itself will help to weed out the bad apples very quickly. The implication here is that national governments urgently need to put policies in place to control the proliferation of qualifications offered via the Internet as this in turn has a direct impact on the quality of a country's workforce.

Opportunities & threats of education commoditisation

If there is one prediction we can make with certainty is that the e-learning revolution is well underway and the process is irreversible. While we are currently seeing a lot of the focus taking place at the level of higher education, this will quickly filter down to the secondary and primary education. Again the implications mentioned above will become doubly important at these levels as we will be catering to the younger more vulnerable and impressionable sections of human society. Let us look briefly at what we consider to be the main threats of immediate concern before turning to the opportunities and final recommendations.

Threats:

1. There is a single loop process at work between commoditisation of education and e-learning as both are influencing each other – the chicken and egg and conundrum if you like. However, as e-learning evolves, more rapid commoditisation is likely to occur. This has the potential to undermine national education systems where governments once had direct control, as parents will now have wider options outside national boundaries.
2. The full integration of the telecommunications industry, linking cable TV to the Internet and digital mobile telephone technology will further add to the speed of the e-learning revolution. If poorer developing nations are unable or unwilling to respond to this technological change their markets can be bombarded by 'external', or better yet, 'non-national' providers who may not have their national interest at heart. Can you imagine a world with a global curriculum? Whose history will our children focus on? Who will be their teachers and what values will be passed onto them?
3. In the absence of national Science and Technology policies or the wherewithal in developing countries, the e-learning revolution is likely to widen the gap between the rich and poor, not only between nations but also within nations, as richer kids with access to technology will have better opportunities. Some may argue that this is already the case, but the argument here is that the speed and force of the e-learning revolution will produce this unfortunate outcome much more quickly.
4. As the Digital Generation comes of age their demands will be for 'virtual compliance' in every aspect of their lives, including their education. Therefore, education providers who fail to see this rapid change and remain stuck in the old model of delivery will lose the battle.
5. The e-learning revolution also has implications for retraining and retooling teachers. Many teachers in the educational systems of the developing world remain challenged in the Digital Age and whereby a teaching career may last 20-30 years, it would mean that a lot of older teachers will still come into contact with the Digital Generation who will place excessive demands on them if they are not properly trained and equipped to work in an e-learning environment.

6. As intimated before, cultural values and societal norms can be undermined in a globalised world were dominant cultures suppress others (either by design or unintentionally) through education in a virtual world.

Opportunities:

As a higher education provider, we at MJM Management Systems Inc. though cognisant of the above threats, see an imbalance in favour of opportunity. Our divisions the Caribbean School of Business & Management and the Academy of Learning are both international in nature, with the former offering only internationally recognised certification through Cambridge International Examinations and others, and the latter, a Caribbean division of the Canadian based institution offering Career, Business and Computer training.

In fact it is through our Academy of Learning division that we have made the great leap forward into e-learning and can speak with authority as to its benefits.

1. E-learning provides the student with more choice by offering a wider selection of programmes.
2. E-learning allows the student to select the best that he or she can afford without having to leave their country of origin, home or office.
3. For the educational provider, the e-learning gives the opportunity to increase market share through the Internet. However, an e-learning strategy and project must be very well conceptualized, planned and developed. There must be a clear project management methodology in place together with competent solution-providers who understand your needs.
4. E-learning allows the education provider to widen its product portfolio, providing the correct strategic alliances are made.
5. At the national level, the Government of Barbados, for example, can build on its reputation for high standards in education by graduating towards an e-learning platform and eventually selling its education (at all three levels) beyond its shores. This is where governments need to make smart alliances with private companies that can design and provide solutions to meet their e-learning requirements.
6. At the national level, there is an opportunity to link e-learning to Science and Technology policy and in the case of developing countries seek grants or loans to build such capability.
7. E-learning will force developing countries to digitise at a faster rate if they want to compete in a global economy. The spillover effects are endless as digitization and more efficient use of information technology can positively contribute to a country's GDP.

Conclusion

At this juncture the conclusion seems foregone – the commoditisation of education which started centuries ago at the institutional level, has now reached the product and delivery (methodology) levels. In the final instance, we have shown that information technology and consolidation of telecommunications will provide the necessary environment for e-learning to develop and proliferate.

The e-learning revolution as we called it, will bring with it a number of opportunities as well as threats, but it is a force not to be ignored by educational providers or even national

governments; for if any of these key stakeholders fail to respond adequately and timely, then we are likely to see more social pressures and manifestations of social disarray as the Digital Generation comes of age and their needs are not met.

Many of the issues highlighted here still require further research but the idea is to generate discussion between education providers and national policymakers.

Ultimately we firmly believe that Barbados has the necessary infrastructure and manpower to seize the opportunities therein, but if as businesses and as a country we fail to respond quickly and adequately, we may very well miss a golden opportunity to take us forward to another level of human development.

Widening participation: the role of community development and community education

Alison West
The National Extension College, UK

The current UK government is provoking debate, often defensive in tone, about the relationship between class and educational access and attainment.

From the current row over the class imbalance in UK universities to a concern that vocational skills levels are lower than those in comparable countries, there is a general interest in widening provision. The debate ranges across traditional age divisions. The universities point out that the entrance rate for working class students is as high as that of more middle class applicants with comparable qualifications. The problem is that working class students do not have comparable qualifications and the universities point to the school system as the location of class imbalances in the tertiary system. Schools in turn argue that pre-school provision is essential given how early in life the attainment gaps begin to appear. The end result is pressure across the UK educational system.

Traditional providers are under political pressure to widen participation and distance learning providers are more than willing to support this. The recent consultation document from the Learning and Skills Council on widening participation, *Successful Participation for All,* sees that Open and distance learning, e-learning and blended learning will offer "increased opportunities for engaging potential learners" (LSC 2003). This acknowledges the historical role that a variety of distance and open learning has played in reducing barriers to participation. There remains in parts of the distance system an idealism about the contribution distance learning providers can make to the redressing of social disadvantage but such committed distance educators face two problems. One is the commercialisation of educational provision, where a number of providers see students as customers. As a consequence, they have a greater interest in those with money to pay fees at a highly profitable level. They are less concerned with retention rates and indeed it is a harsh reality that the ideal customer for them is one who pays fees and promptly drops out, requiring no rebate. For disadvantaged groups with poor previous experience of education, they need good advice and support systems, these cost money and they are often not on offer from commercial providers.

The second problem is also money-related in that subsidies for students and for provision suffered badly in the UK local government budget cuts of the 1980s and early 1990s and has not yet recovered. The not-for-profit part of the sector has a greater level of concern for student progress in learning and for high retention rates but they struggle in a largely unsubsidised sector to provide the sort of support that will both attract in a wider social range and also prevent premature or unnecessary drop-out.

Ironically for those working in the not for profit sector, the current UK government, across the four nations of England, Scotland, Wales and Northern Ireland is putting substantial amounts of public money into helping the disadvantaged. This assistance is both individual, with Jobseekers Allowances and various Welfare to Work programmes, but also collective and area based, reflecting the desire of government to grapple with the effect of

concentrations of poverty. In relation to individuals, attempts were made to use educational provision to deal with remedial and access issues, including the ill-fated Individual Learning Accounts. These were a bold move to give help to learners in a way that allowed choice on the terms of the learner, rather than through the direct subsidy of providers. In terms of more collective approaches, some attempts were made to link area based deprivation with educational access - in England the Neighbourhood Support Fund under the Connexions service of the DfES set up over 700 community projects to reintegrate young people age 13-19 who were not in education training or employment. This programme used a community development approach to set up provision in local community centres and this proved effective in attracting in the young people and in enabling progression and, for many reintegration into mainstream provision.

This sort of approach continues to be unusual and over the last 30 years the promising links developed in the 1970s in the UK between community education and community development somehow never reached the stage of consolidation. Education settled back into an emphasis on the individual learner as community education became starved of resources. Inadequate funding forced community education to restrict itself to self-financing and therefore popular forms of education, a form of "education lite". One good side of the emphasis on the individual learner as paying customer was the marked change in the way providers organised courses and access. Most institutions now offer responsive and flexible systems with in the best cases childcare, access courses, good tutorial support and advice, a wide range of courses and options, fewer restrictions on entry, acceptance of alternative and transferable skills and experience and so on. The discovery of adult literacy problems in the early 1970s did lead to a wide range of literacy and basic skills programmes and the net effect of all of these changes has made it theoretically possible for a complete starter from a highly disadvantaged area to progress all the way from basic skills to a Ph.D with fewer obstacles than ever before. Why then do we still see class bias at virtually every level of the education system?

The answer again harks back to the late 1960s and early 1970s where the importance of attitude was explored. Jennifer Rogers pointed out in Adults Learning (1977) that many inexperienced people simply do not know what is involved in returning to study. At its most basic level, they are unsure how to enter a classroom. In relation to the underachievement of working class children at school, it has long been known that home-school links are vital and indeed early experiments by the WEA in Glasgow showed that parents studying not only in the same school but often in the same class as their own children produced better educational outcomes with higher teacher satisfaction and fewer problems of behaviour. Making provision flexible, user-friendly and culturally acceptable to inexperienced groups is essential and it may be that the larger institutions have gone as far as they can. They are still too large, too far away and too intimidating for returner adults and young people to feel comfortable. We should therefore be looking at intensely local provision, back not just to the community school movement of the 1960s and 1970s but also to the Cambridgshire village college model of the 1930s. Making education normal and local is vital. And this means all subjects at all levels, not limiting poorer people to functional or remedial education alone.

How is this to be done? How do we move from the provider dominated menu system, obsessed as it is at present with both targets and qualifications, to look at where people actually are, both physically and in terms of readiness? One way forward might be to link education more into the area-based programmes designed to regenerate deprived areas, both socially and economically. Social Inclusion Partnerships in Scotland, Neighbourhood

Renewal in England, Communities First in Wales, Community Strategies in Northern Ireland - all of these programmes seek to reduce the gap in quality of life between disadvantaged and average areas. Substantial amounts of money are going into them. These programmes include an educational element but this is usually geared to what is called capacity building, a form of training residents to cope with their own social and economic problems and also to interface with the professionals and agencies paid to help solve such problems. It is more akin to training than education and is highly functional in nature. It also continues to be provider led in that contracts are let to providers by regeneration partnerships and are seldom under the control of residents alone. A Home Office experiment springing from the Social Exclusion Unit's Policy Action Team process in the late 1990s did give local residents vouchers to draw in the advice and training they themselves felt they needed but this has not been mainstreamed. It remains true that even at community level "students" are offered provision packaged elsewhere and even more true that it is highly geared to the other, non-educational targets of providers. "Pure" education is still not valued, let alone given as a social good to the poor.

The answer to class bias in educational take up therefore is to shift both provision and choice into the hands of the intended beneficiaries. Individual Learning Accounts may have ended in disaster due to unscrupulous or fraudulent providers but the concept was along the right lines- let people chose the education they feel is right for them at the time, in the form they feel appropriate. For low confidence people with only sketchy knowledge of the vast range of educational provision available this free choice system may be overwhelming. A more collective and neighbourly approach could give substantial benefits, as information is passed around, as courses are recommended, as peer support is developed through informal systems. Community owned educational programmes are easy to design and run if done by marrying two parallel systems in the UK, community development and educational provision.
All poorer areas are served by what at times seems a vast army of helpers, from tenant liaison officers to community economic development officers. A recent Home Office survey estimates that there are over 15,000 community workers in the UK, to take only one professional area. (Glen *et al,* 2003). The problem is the division between those working to develop an area, particularly economically, and those with knowledge of the sort of learning and education that is wider than simply capacity building. Equally many professionals providing education have no method of contacting ordinary local people, the people who do not self- present on to educational courses. Joining forces makes sense to both sides.

If this were to happen, one obstacle to participation would be removed – local people would know what is available and be encouraged to participate. Other obstacles, of time, money and travel will remain. One feature of highly disadvantaged areas is the degree to which they are cut off, often physically, from mainstream society. This isolation can be difficult to break down if facilities are an expensive travel distance away, or if a culture of isolation has developed to create fear of place issues. For some people, caring responsibilities make it difficult to travel to educational provision. There is no doubt that a consequence of shifts in housing policy over a number of years has been the reduction of social housing to a form of sheltered accommodation (without the support, of course) for those with poor support systems, those surviving mental health problems, and people out of the labour market for a variety of reasons. Distance learning that can take place in the home offers a way out, if provision is geared to their needs. Ironically, for those with bad memories of formal education, the very impersonality of unsupported distance learning can be its greatest attraction.

A recent experiment carried out by the National Extension College, a UK educational charity with experience in distance learning provision, shows that home study can reach highly disadvantaged groups. Modern distance learning offers flexible provision to suit the needs of the learner. Organising support gets over many of the alienation effects stereotypically attached to distance learning. The NEC project shows that disadvantaged learners value a mixture of home-based learning and personal contact, even when that contact is not face-to-face. NEC joined forces with the Princess Royal Trust for Carers to provide a wide and flexible range of courses for those unable through caring responsibilities to attend college regularly. Some carers chose courses to increase their employability, even if they were unable to work at present. They chose GCSEs or A levels, or book-keeping or accountancy. Some preferred courses related to their role as carers: A Taste of Counselling was one popular choice. Students are supported by a mentor, who gives advice even before the choice of course, in order to avoid any demoralising mistakes. Samples of course materials are sent and students can even try an assignment to make sure that the course is really what they want. In addition to a specialist subject tutor, the mentor continues to offer support throughout the course and the result of this carefully constructed system, not surprisingly, is a high retention rate and very high levels of student satisfaction.

Quite apart from the obvious benefits when disadvantaged groups get access to education, there is also a political dimension to provision, around the issues of control and access. Here there are obvious mutual links between community education and community development. Both disciplines see the development of the individual as being best promoted in a group context. Although community education in practice is often no more than the locating of individual learning in a local setting at its best it is committed to the creation of a learning community. In turn, community development works with local people on a collective response to the opportunities and problems of their own area. Community development depends on having competent and confident individuals who are willing to work together and community education is both one of the goals and one of the vital components of community development itself.

A good interrelated system would see community education operating in three different ways. First of all, the simple provision of plenty of education at all levels is a given good for any community. Secondly, training in the key skills needed for community activism is always useful. The third area is the most difficult- providing information and education when and where needed by community groups. A group fighting an unwanted development needs guidance on the planning system. They may wish help in designing alternative development proposals. Ways of measuring industrial pollution may be wanted. An anti-dampness campaign may want medical knowledge. For such immediate and relevant education, flexible provision is essential and giving community groups control of educational budgets is the only way to ensure appropriate and timely provision. Freire demonstrated the speed with which people can learn if there is a strong need for the knowledge in question and one could argue that this is entirely compatible with giving the consumer what he or she wants, the only different being the collective nature of the customer.

This control is vital: a powerless community without the ability to access knowledge remains powerless.

References

GLEN, A., HENDERSON, P., HUMM, J. & MESZAROS, H.(2003) Unpublished research report for the *Active Community Unit at the Home Office*

LSC (Learning and Skills Council). (2003) *Successful Participation for All: Widening Adult Participation Strategy.*

ROGERS,J. (1977) *Adults Learning* (Milton Keynes, Open University Press)

For details of the Neighbourhood Support Fund see www.nsfund.org.uk
For details of the Home Office SEU voucher experiment, see www.communitydevelopmentlearning.org.uk, the site of the Federation of Community Work Training Groups, who administered the scheme

The Role of a University Electronic Library in modern approaches to the organisation of Distance Learning

Alexander Zakharov and Irina Zakharova,
Tyumen State University, Russian Federation

Introduction

The development of the education system development demands the increased quality of training for graduates. The formation of the educational environment of an educational institution on the basis of information technologies (IT) is expected to solve this problem.

It is necessary to outline discrepancies to the process of IT integration into the existing traditional educational environment of a university. The main reason for this is that the initial purpose of creating IT lay far from educational needs. Mass media, advertising, commerce, the banking system, etc. have already been incorporated into the networked world. As for computerising education, its concept has been formulated, but, the principles and criteria of the efficiency of IT integration into the educational environment of educational institutions have been insufficiently developed.

Two Purposes of IT Implementation

When an economist and a teacher talk about the efficiency of the educational system, they mean different things, i.e. it is necessary to distinguish two sides of the efficiency of computerising the educational process - efficiency as *rationality* (economical validity) and efficiency as *expediency* (achievement of proper learning progress and development of a student's personality).

The following two purposes of implementing IT elements in the educational process can be outlined (Ehrman, 1999).

The first purpose usually associated with distance technologies is to make education more accessible without reducing its quality and thereby to assist the educational system in training the required number of graduates who meet the needs of the labour market. This generates the new model of education aimed at the pre-planning of career, i.e. focused on a client's wish to get only such education that will bring him/her the expected income. This model is closely approximated to the real economy, which defines two basic agents – manufacturers and consumers. The market law of supply and demand starts to work.

The second purpose is to use IT for changing of the *what* to teach and *how* to teach, i.e. for transforming the contents and methods of training in order to increase the quality of accessible education, providing both the depth and the development of proficiency, creativity and self-education with potential multiple choices of contents and the organisation of the educational process.

The distance learning technologies focused on achieving the first purpose began to develop when open universities appeared – the United Kingdom's Open University (OU UK) in 1969, the National Distance University of Spain (UNED) in 1972, the Open University of the Netherlands in 1982 and the University Abierta in Portugal in 1988. Their basic contribution

to higher education development is their open character – giving a second chance to people who had no opportunity to get university education and a degree when they were younger. Open Universities have developed the learning process model, with the emphasis on self-education. The student is in the centre of the educational process and the educational activity is organised not to teach people but to enable them to study. The OU UK slogan illustrates this approach – *Open as to People, Open as to Places, Open as to Methods, and Open as to Ideas* [The Open University 2003].

Besides creating open universities, many traditional universities in Europe, and now also in Russia, offer multistage programs or individual courses both to their students and external users. Due to communication technologies, such as Email and teleconferencing, traditional universities turn to educational establishments with a hybrid model of training.

The basic technology used in the open distance learning is interactive subject training combining multimedia curriculum delivery with regular testing and knowledge assessment through the web interface. The best results of such approaches are demonstrated with the Cisco Network Academy Program [CISCO networking academy program 2003] (about 300,000 students in more than 10,000 Network Academies all over the world). The main advantage of this programming is the successful introduction of the course in networked technologies into the educational process. Consequently, students are provided with an opportunity to exchange information dynamically that results in creating a network of educational process participants dispersed around the world who interact with each other. Together with training, there is the system of certification enabling the graduate to assess his/her proficiency level.

Such a system is an important component of the educational environment and can be a pattern of developing the technologies of curriculum delivery. However, this is not enough for a classical university education. Unlike «closed» web-courses used in distance learning, the university educational environment is required to provide the opportunity for the student's creative activity in the chosen field with accessibility and redundancy of information resources.

IEE Model for a University

Thus, to achieve the second purpose – improving the quality of education with IT compared with traditional forms of training - students should be provided with multiple-choice educational environment based on IT opportunities the Information Educational Environment (IEE).

On the one hand, the IEE should raise the educational level of students, on the other hand, feedback is required. Students themselves can promote the development of the Information Educational Environment, being part of the staff of lecturers and scientists, contributing to the development of IEE (publications, dissertations, etc). Then the criterion function that estimates the effect of implementing expensive IT equipment can be, for example, the acceleration of this process due to involving students in IEE development.

In the same way as in the earliest days of university education, the technological basis of the university's educational environment is largely determined by the library, but it is now acting in a new way – as the electronic library providing all the educational IT service required.

Let us present a university IEE as three layers that will help interpret the modern mission of university online libraries. (Zakharov and Zakharova, 2003). Libraries (mainly online ones), virtual laboratories and museums act as the resource basis for the IEE model in its first layer.

The second layer (*specialized* IEE) expands the first one. Teachers form it on the basis of their own and applied know-how and technologies to obtain specific results from the educational process with orientation to a certain student category.

At last, the third layer is created on the basis of the first and second ones during the cognitive activity of students themselves and is the combination of *individual* IEEs.

The advantage of the layered IEE model is the opportunity to relate any specific target of IT use to one of the three manageable groups. Each task, associating only with one of the three layers, may be considered more or less independent of the others. It allows making decisions for one layer without conflicting with others.

E-library as IEE Resource Basis

Up to now the definition of a university electronic library has not been precisely formulated. It contains a set of user's requirements on the use of new technologies of processing, storage and search of documents for educational and scientific activities. The most widespread idea of an electronic library as a set of electronic documents and electronic catalogues is based on the intuitive concept of an information system (IS) as a tool for search and manipulations with the data of traditional types (lines, numbers).

The development of computer technologies uses the object-oriented approach for building complex IS. This approach assumes that the IS database contains not only static information, but also the objects (active data). The properties and methods of these active data enable solving users to solve problems. For the IS of the University Electronic Library we have developed the following classes of objects:

- electronic library catalogues, access to catalogues of other libraries, the global electronic catalogue, systems of searching documents and remote delivery systems;
- means of support for collective educational activity;
- storage and delivery of curriculum resources;
- navigation systems and search for educational material;
- educational software;
- software for testing and self-testing;
- electronic interactive reference tools (dictionaries and encyclopaedias, glossaries and databases);
- virtual laboratories.

As a whole these classes enable building an IS which is the basis for the effective organisation of the educational process at all levels of the proposed IEE model. The proposed outline to provide information services is being realised in the Tyumen State University project *Digital Library as the Basis for Corporate Educational Space for a University with a Complex Branch Infrastructure* with World Bank loan.

References

EHRMAN, S.C. (1999) *Technology in Higher Learning: A Third Revolution* (1999) //[Online] http://www.tltgroup.org/resources/dthirdrev.ht ml

THE OPEN UNIVERSITY. [Online] http://www.open.ac.uk /

CISCO NETWORKING ACADEMY PROGRAM. [Online]: http://cisco.netacad.net

ZAHAROV, A.A., ZAHAROVA, I.G. (2003) Electronic Library of High School with the Advanced Network of Branches As a Basis for Becoming the Corporate Information Educational Environment // *Open Education*, 2003, 1, pp.18-23.

The Cambridge International Conferences on Open and Distance Learning

1983 - 2003

1983 First international workshop on Counselling in Distance Education

1987 Second international workshop on Counselling in Distance Education

1989 Interaction and Independence: student support in Distance Education and Open Learning

1991 The Student, Community and Curriculum: international perspectives on Open and Distance Education

1993 Quality Assurance in Open and Distance Learning: European and International Perspectives

1995 Putting the student first: learner-centred approaches in Open and Distance Learning

1997 The convergence of conventional and distance education: patterns of flexibility for the individual learner

1999 Learning and Teaching with New Technologies

2001 Supporting the Student in Open and Distance Learning

2003 The Future of Open and Distance Learning