

Planning & Management of Open and Distance Learning



Training toolkit

Planning and Management of Open and Distance Learning

Trainers' Kit 003

*The Commonwealth of Learning
and
Asian Development Bank*

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FOREWORD

Human development is one of the strategic objectives of the Asian Development Bank. The Bank recognises that social and economic development ultimately depends on the quality of human development. People with basic education are more productive and more likely to play an active role in development. Well-nourished people are healthier and learn better. The synergies among education, health and nutrition are well documented, and it is universally recognised that investment in human development is an essential component of any development plan.

The Bank has been investing directly in human development for more than twenty years. Since 1990 alone the Bank has provided over \$2 billion and \$.5 billion for health, or about seven percent of overall Bank lending for development in that period. Within its education portfolio, there has been a substantial shift in recent years towards primary, lower secondary, and non-formal education in recognition of the fact that investment in basic education has a much higher rate of return. The Bank continues to support higher and technical-vocational education but is increasing its focus on basic education.

Within basic education, the Bank understands that quality and access are perhaps the two most critical issues. People must be able to attend school, and the education provided to them must be good enough to enable them to learn effectively. Provision of adequately trained teachers is all too often an impediment to providing quality basic education. Distance education has been shown to be an effective means of reaching untrained teachers in remote areas, enabling teachers to receive information and techniques that would otherwise have to be acquired through prohibitively expensive classroom-based instruction.

The Bank has in the last decade supported a number of regional activities in the area of distance education, and extended that support to the area of distance education for primary teacher training in the context of a regional technical assistance project implemented together with United Nations Educational, Scientific, and Cultural Organization (UNESCO) and The Commonwealth of Learning. The project aimed to develop national action plans for primary teacher training through distance education in selected countries and to develop capacity to plan and implement distance education programmes. The Commonwealth of Learning collaborated with the Bank to undertake a series of training workshops in distance education and to develop materials for these workshops.

Those materials comprise three topics in this series of six: (i) planning and management of open and distance learning, (ii) use and integration of media in open and distance learning, and (iii) designing open and distance learning materials. The materials have been designed in a flexible manner so that they can be used by a

variety of trainers in a variety of situations. Their basic aim is to contribute to the development of essential skills related to the design and implementation of distance education programmes – an aim of great importance to both the Bank and The Commonwealth of Learning in their efforts to ensure that quality education is made available to all persons in a cost-effective manner.

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Planning and Management of Open and Distance Learning

1. Background

The Commonwealth of Learning (COL) and the Asian Development Bank (ADB) are pleased to provide this toolkit for your use and we sincerely hope that it will be a valuable resource for anyone planning and conducting training in the practice of open and distance learning.

The development of this toolkit and others, in various topics related to open and distance learning, has involved the time and dedication of a number of organisations and individuals. The impetus and financial support which enable COL to embark on this undertaking came from the Asian Development Bank. Under the terms and conditions of the ADB Regional Technical Assistance Project for Capacity Building in Distance Education for Primary Teacher Training, COL was commissioned to prepare training materials for use in three training workshops in the Asian region. In addition, COL decided to concurrently develop an additional three toolkits. Therefore, toolkits will be available in the following topic areas:

- overview of open and distance learning
- designing open and distance learning materials
- planning and management of open and distance learning
- use and integration of media in open and distance learning
- quality assurance in open and distance learning
- learner support in open and distance learning

Each of the training toolkits will incorporate several elements including:

1. detailed trainer's guide including training strategies, exercises and activities
2. master overhead transparencies
3. recommended reading list
4. case studies of best practices

The toolkits are designed to stand alone although it is envisaged that trainers may choose to use complementary segments from other kits in order to customise training workshops for particular audiences. It is assumed that the ultimate user of the toolkit, the trainers, will have extensive experience and knowledge of the subject area and will augment and embellish as required.

Professional staff at COL were responsible for developing the preliminary blueprint for each of the six topic areas. The International Extension College, Cambridge, UK, was then commissioned to prepare the toolkits. IEC staff, COL staff and trainers, who were responsible for the first pilot test of the materials, consulted regularly throughout the development process.

A special thank you is extended to Dr. Charles Currin, Senior Education Specialist, Asian Development Bank, who has provided encourage and support throughout the

RETA project. Sincere appreciation also goes to Dr. Barbara Spronk, Executive Director, IEC and her staff, for their dedication, commitment and hard work in developing and producing the toolkits.

Finally, a special note regarding the case studies section of the toolkit and the gracious co-operation of the many colleagues from around the world who so readily agreed to share their experiences and prepared a case study for inclusion in the toolkits.

The training of people in the practice of distance education continues to be a priority for The Commonwealth of Learning and we are hopeful that this series of toolkits will be a valuable resource for the distance education community. We of course would welcome your comments and feedback so that we can continue to improve and enhance the toolkits.

2. Introduction to the Kit

In the pages that follow, you will find a variety of resources intended to assist you in preparing and offering a workshop on planning and management in open and distance learning.

The materials are arranged by topic, twelve in total, followed by a bibliography of suggested readings, glossary of terms used in open and distance learning, and a set of case studies. Within each ‘topic’ section, you will find

- a complete table of contents;
- an overview of the section and the sources from which materials were drawn;
- a variety of material, including definitions, descriptions, diagrams, and checklists;
- a set of practice exercises; and
- a set of masters from which to make overhead transparencies.

Interspersed throughout the materials are examples of the issue or practice that is being outlined. These examples have been set out in indented sections like the following:

Examples: The University of the West Indies uses audio conferencing to link its various campuses and learning centres.

Suggestions for involving your workshop participants in the generation of additional examples that are drawn from their own experience are set out in screened boxes like the following:

Discussion: Take advantage of the wealth of examples available from both your own and your participants’ experience. Use this opportunity for a discussion of the management problems your participants are trying to solve.

The case studies are provided as yet another source of illustrative examples of actual practice.

These materials are not intended as a course in planning and managing open and distance learning programmes. There are no 'objectives', no prescriptions, and no statements of what you should be able to do as a result of having worked through the kit. Neither are the materials intended as an outline of an actual workshop, for you are faced with new audiences, new contexts, and new challenges each time you set out to conduct a workshop. You may adapt these materials to any situation, as in these examples:

- you may be asked to provide a three-day workshop to a group of ministry officials and high-level managers from a variety of educational institutions and agencies, all of whom are new to the idea of distance education, to introduce them to the challenges of undertaking a distance education programme; or
- you might have two weeks to spend with an audience that consists of the deans and department heads of a variety of faculties from one institution, who have been struggling to develop distance education programmes in their units and who have asked for a workshop that will give them an overview of what is involved; or
- you may be asked to do a one-day workshop on distance education for people who are not managers themselves, but who need a clearer understanding of what is involved in management in order to more effectively do their jobs as course designers, tutors, or regional office staff.

As an experienced trainer you know that designing an effective workshop is the same as designing an effective course: the participants' needs and contexts come first, and your decisions about what you will present and how you will present it will follow from what you are able to find out about your audience. Of course your workshop design will also be influenced by your own experience, expertise, and point of view because you bring a wealth of knowledge, skills, and understanding to your task. Consequently, a 'trainers' kit' can aim only to supplement your own resources and to offer some ideas and materials to use or not use as you choose, based on your tasks and needs.

We hope you will find these materials useful. They are based on the real-life training experiences of a range of distance educators, some of whom prepared the outline for the kit, some of whom prepared the topic-by-topic materials, some of whom provided the case studies, and yet others who reviewed and piloted the first version and offered valuable advice and suggestions as a result. We look to you for continuing advice and suggestions, especially in the form of training materials that you have found useful and would be willing to share with others via the agency of The Commonwealth of Learning. Please contact the COL Project Manager, Patricia McWilliams, at the address provided in this kit, with your comments.

TOPIC 1

Introduction to Open and Distance Learning

Overview

Source materials for this topic

The concept of open and distance learning

Definitions

Distinguishing the types of open and distance learning

Time and place continuum

Open and distance learning systems

Advantages of open and distance learning

A systems approach to open and distance learning

Functions of open and distance learning

Kinds of open and distance learning

Practice exercises

Categorising various institutions

Application to home institutions

1. Overview

These materials support an introductory discussion on the topic of open and distance learning. The discussion is in two parts.

The first part discusses the concept of open and distance learning by defining terms and distinguishing the various types of open and distance learning, and then by establishing each type along a time and place continuum. The various sections of the first part can be used as follows:

- The *definitions section* focuses on the six features common to most definitions of open and distance learning. You may want to reword these definitions, or add to them. A discussion of *accreditation*, for example, can show how open and distance learning involves both teaching and learning and thereby is different from entirely self-directed learning. A discussion of *two-way communication* can raise points about learning theory that are central to distance approaches. A discussion of *industrialised processes* can be a starting point for discussing ways in which the teaching function in open and distance learning is reconfigured into *course development* and *course delivery*, setting open and distance learning apart from more conventional approaches to teaching and learning.

- The *distinctions* section provides material that will help you establish a working vocabulary for your workshop. Some examples are provided, but you will want to draw examples from your own experience and from the experience of your participants.
- The *time and place continuum* section provides an opportunity to discuss the varieties of delivery systems possible in open and distance learning. Again, you will want to draw examples from both your own and your participants' experience.

The second part looks at the types of open and distance learning systems, and can be used as follows:

- The first section lists the *advantages* that open and distance learning offers. This section is intended to prompt discussion of the problems that participants expect open and distance learning to help them solve.
- Open and distance learning applications are then studied using a *systems approach*, which recognises that all parts of the system are interrelated.
- Then the *functions* list provides one way of describing and labelling the tasks involved in operating an open and distance learning programme. You may have another list. The point is to emphasise how distance makes a difference in carrying out these functions.
- Finally, the *modes* or types of open and distance learning institutions and programmes are described. Again, you will doubtless have many examples to offer, and you may also want to take this opportunity to start participants thinking about the mode of open and distance learning in which they are operating or plan to operate.

1.1 Source materials for this topic

Jackling, N. Weaving my own design. In M. Parer (ed.) *Development, design, and distance education*. Churchill, Australia: Centre for Distance Learning, Monash University, 1989.

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Mugridge, I. The language of distance and open learning. *Journal of Distance Education*, IV: 2, pp. 83–85, 1989.

Sewart, D. et al. (eds.). *Distance education: international perspectives*. London: Croom Helm, 1983.

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2. The concept of open and distance learning

2.1 Definitions

There is no one definition of *open and distance learning*. Rather, there are many approaches to defining the term. Most definitions, however, pay attention to the following characteristics:

- **separation of teacher and learner** in time or place, or in both time and place;
- **institutional accreditation**; that is, learning is accredited or certified by some institution or agency. This type of learning is distinct from learning through your own effort without the official recognition of a learning institution;
- **use of mixed-media courseware**, including print, radio, and television broadcasts, video and audio cassettes, computer-based learning, and telecommunications. Courseware tends to be pre-tested and validated before use;
- **two-way communication** allows learners and tutors to interact as distinguished from the passive receipt of broadcast signals. Communication can be synchronous or asynchronous;
- **possibility of face-to-face meetings** for tutorials, learner–learner interaction, library study, and laboratory or practice sessions; and
- **use of industrialised processes**; that is, in large-scale open and distance learning operations, labour is divided and tasks are assigned to various staff who work together in course development teams.

Discussion: Take advantage of the wealth of examples available both from your own and your participants' experience. The case studies provided with this kit describe institutions around the world that exemplify the characteristics of open and distance learning.

2.2 Distinguishing the types of open and distance learning

The term *open and distance learning* and its definition are relatively new in the field of education, having gained prominence only in the past 15 to 20 years. The language and terms used to describe distance learning activities can still be confusing, and geographical differences in usage — for example, between North America and Europe — can add to the confusion. Among the more commonly used terms related to open and distance learning are the following: *correspondence education, home study, independent study, external studies, continuing education, distance teaching, self-instruction, adult education, technology-based or mediated education, learner-centred education, open learning, open access, flexible learning, and distributed learning*.

Correspondence education, home study, and independent study

These distance learning methods are:

- well over a century old;
- based on stand-alone, self-study materials. Learners do not have to leave their homes to study; and
- often print-based with communication through postal services or telephone. They can, however, use a variety of means for tutor–learner contact, including the postal system, telephone, electronic mail, television and radio broadcasts, and video and audio cassettes.

Example: Many university programmes in North America have, in the last 15 years, renamed their correspondence programmes to more current titles such as *open and distance learning* or *independent study*.

External studies

The term *external studies*:

- applies to instruction that takes place somewhere other than on a central campus, such as a classroom remote from campus; and
- includes a variety of delivery options like audio, video, or computer conferences or home study.

Example: The Centre for External Studies at the University of Namibia is responsible for open and distance learning programming.

Continuing education

The term *continuing education*:

- usually applies to non-credit education;
- refers to courses that can be delivered on campus or at a distance; and
- has varied meanings.

Example: See the case study on the Distance Education Unit at the University of Botswana, which is part of continuing education at the university.

Distance teaching

The term *distance teaching*:

- refers to only half of the open and distance learning equation: open and distance learning encompasses not only teaching but learning; and
- emphasises the teacher's role rather than the system.

Self-instruction

The term *self-instruction* refers to a process in which:

- materials take learners step-by-step through an instructional process;
- self-assessment exercises are a central feature; and
- instruction can be paper-based or computer-based.

Example: The Faculty of Medicine at Chulalongkorn University in Thailand makes a variety of self-instructional packages available via computer-assisted instruction on topics such as the circulatory system. Many language schools offer self-instructional packages that consist of print materials and audio cassettes.

Adult education

The term *adult education*:

- emphasises the principles of adult learning, often known as *andragogy*, as compared to *pedagogy*, or child-centred learning.

Example: See the case study on the University of Botswana, Distance Education Unit, which offers a Certificate in Adult Education at a distance.

Technology-based or mediated education

The term *technology-based education*:

- refers to systems of teaching and learning in which a technology other than print has a major role; and
- takes two major forms stand-alone (for example, computer-assisted learning and computer-managed learning) and conferenced (for example, audio, video, or computer).

Examples: The University of the West Indies uses audio conferencing to link its various campuses and learning centres. Two of the postgraduate degrees available in distance open and distance learning — those offered by Athabasca University and the Open University of the United Kingdom — use computer conferencing as a primary mode of delivery. See the case studies on both the University of Guyana, Institute of Distance and Continuing Education, which uses audio teleconferencing, and the Open Learning Information Network in Canada, which delivers courses via the World Wide Web.

Learner-centred education

In learner centred education, integrity and freedom of the individual is primary. Therefore, the teaching and learning process provides:

- flexible sequences of study;
- negotiated objectives and content;
- negotiated learning methods;
- negotiated methods of assessment; and
- a choice of support mechanisms.

Open learning

The educational philosophy of open learning emphasises giving learners choices about:

- medium or media, whether print, on-line, television, or video;
- place of study, whether at home, in the workplace, or on campus;
- pace of study, whether closely paced or unstructured;
- support mechanisms, whether tutors on demand, audio conferences, or computer-assisted learning; and
- entry and exit points.

Example: Many institutions use the term *open* in their names.
See the case studies for:

Open Access College and the Open Learning Institute of
Charles Sturt University, both in Australia;

Open Learning Information Network in Canada;

Indira Gandhi National Open University in India;

Open University of the University of the Philippines; and

Open University of Sri Lanka.

Open access

The term *open access* implies a lack of:

- formal entry requirements;
- prerequisite credentials; and
- an entrance examination.

Flexible learning

The term *flexible learning* emphasises the creation of environments for learning that have the following characteristics:

- convergence of open and distance learning methods, media, and classroom strategies;
- learner-centred philosophy;
- recognition of diversity in learning styles and learners' needs;

- recognition of the importance of equity in curriculum and pedagogy;
- use of a variety of learning resources and media; and
- fostering of lifelong learning habits and skills in learners and staff.

Example: See the case study for Deakin University, which describes the challenges of implementing a flexible learning system.

Distributed learning

The term *distributed learning*:

- **emphasises** the learning itself rather than the type of technology used or the separation between teacher and learner;
- makes learning possible beyond classrooms; and
- when combined with classroom modes, becomes *flexible learning*

Discussion: You and your participants can provide a wealth of examples of different types of delivery systems from your experience in open and distance learning. The case studies included with this kit are a ready source of examples as well.

2.3 Time and Place Continuum

Open and distance learning programmes fall somewhere along two continua: the continuum of time and the continuum of place. The *place* continuum has at one end all learners and their tutor or instructor gathered at the same place, and at the other end all learners and their tutor or instructor in different places. The *time* continuum has at one end all learners and their tutor or instructor interacting in ‘real time’, that is, at the same time, and at the other end all learners and their tutor or instructor interacting at different times.

The following chart demonstrates how these two continua intersect. Their co-ordinates are numbered and match four scenarios for open and distance learning. Most open and distance learning providers use a combination of the four scenarios.

Scenarios for Open and Distance Learning

	Same Time	Different Time
Same Place	1	2
Different Place	3	4

1. *Same place and same time*: Classroom teaching, face-to-face tutorials and seminars, workshops, and residential schools.

Example: See the case study for the Open Learning Institute, Charles Sturt University in Australia, for an example of an institution that relies on residential schools to provide interaction between learners and tutors is being challenged.

The case study for the University of Nairobi describes a programme that is implementing more residential schools, to replace its tutorials.

2. *Same place but different time*: Learning resource centres, which learners visit at their leisure.

Example: See the case study for the Open Access College in Australia for an example of an institution that has a number of resource centres.

3. *Different place but same time*: Audio conferences and video conferences; television with one-way video, two-way audio; radio with listener–response capability; and telephone tutorials.

Example: See the case study for the Indira Gandhi National Open University for an example of an institution that is using audio conferencing and television with one-way video and two-way audio.

4. *Different place and different time*: Home study, computer conferencing, tutorial support by e-mail, and fax communication.

Example: The case studies provided with this kit describe a wide variety of ways to make learning materials available for this kind of independent study.

3. Open and distance learning systems

3.1 Advantages of open and distance learning

Open and distance learning offers a number of advantages to both learners and to providers of opportunities for learning. Problems such as distance and time, which are barriers to conventional learning, are overcome in open and distance learning.

Overcoming physical distance

Open and distance learning can overcome problems of physical distance for:

- learners in remote locations who are unable or unwilling to physically attend a campus; and

- learners and teachers geographically separated in that teachers in urban settings instruct learners in rural settings.

Example: See the case study on the University of Guyana, Institute of Distance and Continuing Education, for an example of an institution that is serving a widely scattered and remote population using open and distance learning.

Solving time or scheduling problems

Open and distance learning can solve time or scheduling for:

- client groups unwilling or unable to assemble together frequently;
- learners engaged in full-time or part-time work, both waged and volunteer; and
- family and community commitments.

Example: See the case study for the Southern Africa Extension Unit for a description of a programme for training councillors in local government.

Expanding the limited number of places available

Open and distance learning can expand the limited number of places available for:

- campus-based institutions few in number; and
- stringent entrance requirements.

Example: See the case study for the Open University of Sri Lanka for an example of an institution that is expanding access to university education in a country where the number of places available at conventional universities is very limited.

Accommodating low or dispersed enrolments

Open and distance learning can accommodate:

- low enrolments over a long period of time; and
- low enrolments in one geographic region but additional enrolments elsewhere.

Example: See the case studies for the University of Guyana and the Open Access College in Australia for examples of institutions that are meeting the challenge of dispersed enrolments.

Making best use of the limited number of teachers available

Open and distance learning can make the best use of the few teachers available when:

- there is a lack of trained teaching personnel relative to demand;
- teachers are geographically concentrated; and
- teachers with certain expertise are in short supply.

Example: See the case study for the Open Access College, Australia.

Dealing with cultural, religious, and political considerations

Open and distance learning can deal with differences, and consequently:

- widens women's opportunities to learn;
- meets the needs of populations affected by violence, war, or displacement; and
- makes learning possible even when group assemblies are proscribed.

Discussion: Use this opportunity for a discussion of the problems your participants are trying to solve.

3.2 A systems approach to open and distance learning

A systems approach sets the conditions for proceeding in an orderly way. A systems approach also recognises that all the components of the system are interrelated. A change in one component will bring about changes in the others.

Open and distance learning programmes, units, and institutions use a phased model for problem solving:

analyse → design → develop → implement → evaluate → revise

Analysis: a detailed examination of all facets of the problem

- What is the problem to be solved?
- Is the problem an instructional problem or an environmental problem?
- Who has the problem?
- What are the resources available to solve the problem?
- What are the constraints or limitations to be faced?

Output from the analysis phase:

- a clear statement of the problem
- a detailed description of the target population
- identification of the resources and constraints

Design: requires the preparation of a detailed solution

- Who are the target population and other stakeholders?
- What will the solution accomplish?
- How will the participants be different after the course or programme?
- How will the participants achieve the objectives?
- How will the course or programme be developed?

- How will you know your solution is effective?

Output from the design phase:

- a detailed plan that describes how, when, by whom, and at what cost the problem will be solved

Development: must address the following kinds of questions

- What strategies, media, and methods will be used for each objective or task?
- What learning resources will be required?
- Where, when, and how will learners be ensured of feedback as they practise their skills?
- Where, how, and when will evaluation activities be used?
- What will be the consequences of success or failure or both?
- How will the instruction be evaluated and revised?

Output from the development phase:

- a complete course or programme package, including all materials, tools, equipment, and plans for delivery, learner support, learner evaluation, and course evaluations

Implementation: putting the solution into practice

- Are all necessary resources (human, physical, financial) in place?
- Are data collection mechanisms in place?
- Are problem-solving and recording mechanisms in place?

Output from the implementation phase:

- learner progress and performance records
- data from a variety of sources (for example, records and solutions)
- other evaluation data (for example, interviews, questionnaires)

Evaluation: not an 'add-on' but an integral component

- How well does the system meet the goals initially identified?
- How well does it meet the needs of the learners and other stakeholders?
- Do you have sufficient specific information? How will you obtain it?
- What specific changes can be made to improve the system?

Output from the evaluation phase:

- analyses of records and data
- specific solutions, including time, cost, and other resource estimates

Revision: including a review of all decisions and activities of previous phases

- Were the original analyses complete and correct?
- Have circumstances changed sufficiently to require a major review of the analyses?
- What changes, modifications, or improvements are evident in the evaluation data?
- Are sufficient resources available to complete the recommended changes?
- What action needs to be taken?

Output from the revision phase:

- revised course or programme, including the course materials, learner support and evaluation plan, and a revised course evaluation plan

3.3 Functions of open and distance learning

Regardless of the size of the programme, unit, or institution undertaking development and implementation of an open and distance learning system, the following functions must occur at some level. Valuable considerations in relation to each open and distance learning task are listed in the following.

Obtaining and managing money and other resources

- grant-sustained, cost recovery (self-financing);
- higher development and start-up costs; and
- human support relatively expensive component.

Developing or acquiring programmes and courses

- considerable development time required for full-scale development and production;
- buying or leasing courses from other open and distance learning providers may be more effective use of resources; and
- continuum of approaches, from single author to large teams of specialists.

Example: See the case study for the University of Lincolnshire and Humberside for an example of *course franchising*.

Recruiting and promoting

- analyse and assess the needs of your prospective learner populations;
- make information available at right place and time;
- provide sufficient accurate information about time, cost, effort required;
- provide sufficient accurate information about when, where, and how to get involved; and
- reassure potential learners about legitimacy and credibility.

Physically producing, reproducing, storing, and disseminating materials

- course materials requirements may demand print, audio, video, or computer software;
- dissemination may require post, courier, transport companies, telecommunications, broadcasts, satellites;
- physical production and reproduction time consuming; and
- specialised equipment and personnel required for storage, handling, packaging, dispatch, inventory.

Enrolling and registering

- process varies from simple manual lists to complex electronic systems;
- fixed or rolling entrance dates; and
- range of delivery options available.

Delivering programmes and courses

- two-way communication required;
- evaluation and feedback;
- collaboration with other agencies;
- library services; and
- record systems.

Providing learner support

- personal support such as advice or counselling;
- academic support such as tutoring, grading, and examining; and
- face-to-face or mediated support.

Examining, crediting, and granting credentials

- range of credit options available;
- exam taking and credit evaluation requirements; and
- involvement of professional associations and external agencies.

Evaluating and revising processes, procedures, programmes, and courses

- learner performance;
- learner satisfaction;
- meeting goals and objectives; and
- resistance to change.

Training and developing staff

- orientation and adjustment to new technologies and approaches; and
- awareness of advantages and limitations of open and distance learning operations.

Discussion: There are many ways of labelling and describing these functions; the ones provided here are only suggestions. Extend your list with examples from both your own and your participants' experience.

3.4 Kinds of open and distance learning systems

A variety of terms describe the type of educational provision that involves some version of an open learning approach and uses open and distance learning techniques to a greater or lesser extent.

Single mode institution

- set up to offer programmes of study at a distance;
- some face-to-face interaction involved, but often optional;
- teaching and learning process 'mediated' in some way
 - by print, including correspondence;
 - by audio, including radio (one-way, two-way), cassettes, telephone, or audio conferences;
 - by video, including television (one-way, two-way), cassettes, or video conferences; and
 - by computer, including computer-based training, e-mail, computer conferencing, or World Wide Web;
- characterises many of the world's 'mega-universities', including Indira Gandhi National Open University (IGNOU), Universitas Terbuka, Sukhothai Thammathirat Open University (STOU), and United Kingdom Open University (UKOU).

Example: See the case study for IGNOU included with this kit.

Dual mode institution

- offers two modes
 - one using traditional classroom-based methods; and
 - one using distance methods;
- may also offer the same course in both modes, with common examinations;
- regards the two types of learner as distinct: on-campus and external; and
- may or may not allow 'cross-over' registrations.

Example: See the case studies for the Open Learning Institute of Charles Sturt University, the University of Nairobi, the University of Botswana, and the University of Zambia for discussions of issues facing dual mode institutions.

Mixed mode institution

- offers learners a wide choice of modes of study
independent, group-based, or some combination; and
face-to-face, mediated, or some combination;
- maximises flexibility of place and pace of study;
- the result of ‘convergence’ of face-to-face and distance modes; and
- increasingly characterises organisations that were once ‘single mode’ or ‘dual mode’.

Example: The case studies for Deakin University and Murdoch Universities provide examples of institutions that are now ‘mixed mode’.

4. Practice exercises

4.1 Categorising various institutions

Instructions: Divide the participants into small working groups (no more than five to a group). Give each group a set of three case studies — a single mode institution, a dual mode institution, and a mixed mode institution — without labelling the institutions as such; the case studies that are part of this kit are suitable for this purpose. Ask each group to

- agree on the category they think is most appropriate to each of the three institutions;
- list the main characteristics of each institution that justify the category; and
- report their findings to the group as a whole.

Use the findings of the working groups as a springboard for discussion of the challenges involved in defining *open and distance learning*.

Timeframe: Depending on the language level and experience of the participants, the small group work can take as long as an hour.

Materials: Case studies (see the case studies that are included with this kit); flip chart paper or overhead transparencies, and marker pens.

4.2 Application to home institution

Instructions: Ask participants to spend half an hour, working on their own, describing the programme in which they work, in terms of how the supporting institution (or department or faculty) fulfils the nine functions of an open and distance learning system that have been discussed as part of this topic.

On the basis of this description, ask them to work with a partner to determine what kinds of changes will have to take place in each of these functions to make their institution function more effectively as an open and distance learning operation.

Timeframe: An hour in total, half an hour for individual work and half an hour for paired discussion.

Materials: Paper and pen or pencil for each participant.

TOPIC 2

Issues in Open and Distance Learning

Overview

Source materials for this topic

Government and society

Educational objectives

Bases of political support for open and distance learning

Types of power

Groups that exercise power

Institutional domains

Politics and management decisions

Sources of funding

Government funding

Tuition fees

Ancillary sources

Other revenue

Capital funding

Collaboration

Terminology

Motives for collaboration

Evaluating opportunities for collaboration

Models of collaboration

Risks and benefits

Problems of course transfer and co-production

Sustaining effective collaboration

Quality assurance

Why is there a concern with quality assurance?

What do we mean by 'quality'?

Checklist for a quality assurance programme

Practice exercises

Domains of power

Collaboration role play

1. Overview

These materials support a discussion that:

- situates open and distance learning in a political context; and
- outlines resource mobilisation, collaboration, and quality assurance as three of the major ways in which open and distance learning programmes respond to their contexts.

1.1 Source materials for this topic

Bowles, S., and H. Gintis. *Schooling in capitalist America*. London: Routledge, 1976.

Evans, T., and D. Nation (eds.). *Open education: policies and practices from open and distance education*. London: Routledge, 1996.

Fagerlind, I., and L. Saha. *Education and national development: a comparative perspective*. 2nd ed. London: Butterworth Heinemann, 1989.

Gatwa, B. The Zimbabwe Integrated Teacher Education Course. In B. Koul and J. Jenkins (eds.), *Distance education: a spectrum of case studies*. London: Kogan Page, 1980.

Harris, D. *Openness and closure in distance education*. London: Falmer Press, 1987.

Moran, L., and I. Mugridge (eds.). *Collaboration in distance education*. London: Routledge, 1993.

Oxenham, J. (ed.). *Education versus qualifications?* London: George Allen and Unwin, 1984.

Perry, W. The genesis of the first open university. In B. Koul and J. Jenkins (eds.), *Distance education: a spectrum of case studies*. London: Kogan Page, 1980.

2. Government and society

2.1 Educational objectives

Countries, both developing and industrialised, invest in education to achieve a myriad of economic, political, and cultural objectives. These include:

- expanding free adult literacy and primary education to enhance the social mobility of the poor;
- producing graduates from secondary schools who can perform technical and administrative functions (for example, the indigenisation programmes implemented in recently independent countries to replace expatriates); and
- producing graduates from higher education institutions who can supply the managerial and teaching and training skills need in both public and private sectors.

Education contributes to

- political socialisation;
- cultural homogenisation;

- economic growth;
- upward mobility;
- expanding the use of national language or languages; and
- deepening the understanding of national history.

Discussion: Ask the participants to analyse the economic, political and cultural objectives in their own country and to discuss whether or not they feel that educational objectives are being achieved – if not, why not?

2.2 Bases of political support for open and distance learning

Where open and distance learning has attracted political support, it has done so for a variety of reasons. Among these are:

- to meet training needs; that is, to train large numbers of people quickly and cheaply;
- to widen access in the interests of equity; for example, to educate more girls and women;
- to widen access in response to a demand that cannot be met through the expansion of conventional education; for example, to provide primary education where no schools exist;
- to bring in educational reform; for example, to provide those adults in the United Kingdom who were deprived of an opportunity for university education because of the ‘11 plus’ exams system a ‘second chance’ at higher education; and
- to reduce the threat of protest that is facilitated by bringing learners together; for example, the setting up of open and distance learning institutions by some regimes to meet the demand for higher education and yet keep learners dispersed.

Discussion: What is your participants’ experience? Why has open and distance learning attracted support in their context? Ask your participants to turn to the case studies that have been provided with this kit to compare the reasons they present as to why open and distance learning are supported in their countries.

2.3 Types of power

Ideology and politics are not extraneous variables in open and distance learning, but critical determinants of the context within which it succeeds or fails.

Governments and other groups within society exercise three kinds of power over education, including open and distance learning institutions:

- *coercion*: to a greater or lesser extent decreeing how an institution shall operate, deciding whether it can award degrees, setting limits to what it can teach;
- *funding*: giving or withholding funds, or setting fee policies, thereby exercising economic power; and
- *policy*: by its influence on policy and its ability to set in place regulatory frameworks, seeking to ensure that an institution reflects its own ideology.

Examples:

Zimbabwe Integrated Teacher Education Course

(Source: Gatwa (1980).)

- Demand for education in a newly independent country had coercive effect on government, which in turn led to a demand for more teachers and to the government decision to establish the Zimbabwe Integrated Teacher Education Course (ZINTEC).
- Government exercised strong economic power over ZINTEC, allocating resources to it and determining that teachers trained through it got the salaries due to qualified teachers.
- Programme as a whole reflected government ideology.

Establishment of United Kingdom Open University

(Source: Perry (1980).)

- Important backing by a politician with considerable economic and coercive power, without which the university could not have been established against the indifferent or hostile academic community.
- Future prime minister referred to the creation of an education trust to provide funding.
- Proposal underpinned by ideological commitment to educational expansion.

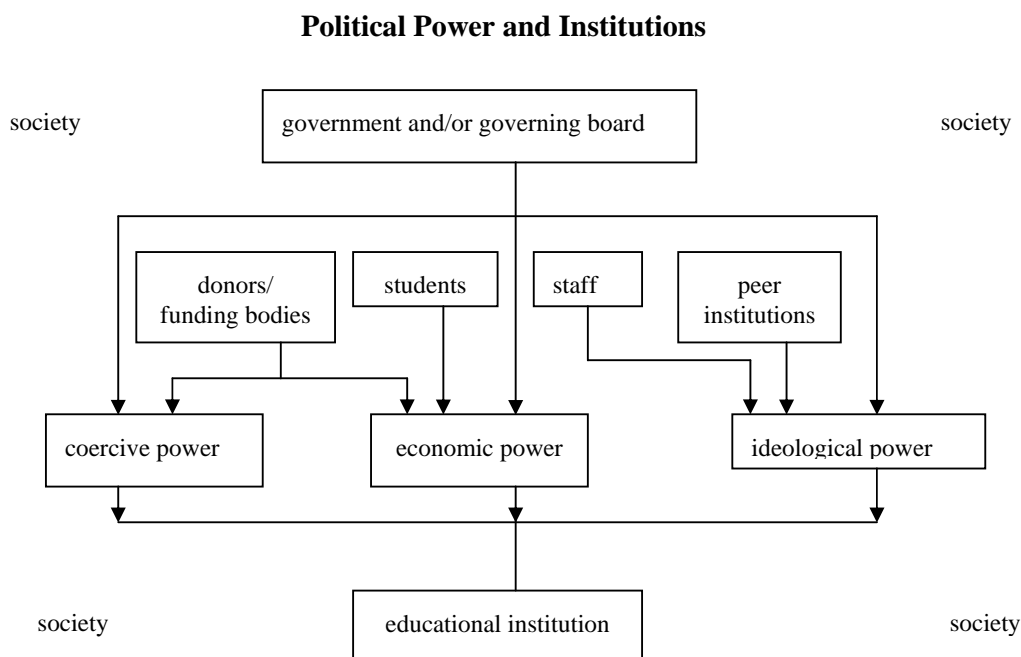
Discussion: Add other examples, perhaps from the case studies in this kit. Use this as an opportunity to discuss with your participants the effects of power on their programmes, how these programmes have developed and in response to what forces.

2.4 Groups that exercise power

A government is not the only group within society that can exercise power over an educational body. Other groups that can exercise power include:

- donor agencies;
- learners;
- staff; and
- other institutions.

These groups are set out in the following diagram.



2.5 Institutional domains

Looking at this diagram from the top down makes it look as though the institution is a powerless creature and that political analysis should confine itself to examining the forces acting upon it.

Not so. Looking at the diagram from the bottom up, we can ask a new series of political questions, such as the following:

- How far can the institution meet the coercive, economic, and ideological needs of the various interests that affect it?
- Can it help to train a workforce and so meet the economic demands bearing on society, governments, and learners?

- Can its courses reflect and reinforce the ideology of government?
- Are the ideology of the staff and the power they have over the curriculum such that its courses deliberately challenge government ideology?

Discussion: Take advantage of the wealth of examples available both from your own and your participants' experience.

2.6 Politics and management decisions

Political discussion about the purposes of education, educational effects, access, and control may seem far removed from the day to day problems faced by those who manage open and distance learning.

Here are some examples of how broader political questions can affect management decisions.

Discussion: Participants can doubtless think of additional examples.

Access and quality

For a given sum it is possible to raise the quality of teaching (for example, by providing more learner support) or to widen access (for example, by enrolling more learners or reducing fees). How the balance between the two is resolved is very much a political matter.

Control over broadcasting

In many countries, governments exercise control over the content of broadcasts. Teachers on the other hand believe they should have the last word over the content of any teaching, whether broadcast, spoken, or printed. Control over broadcasting is very much a political matter.

Legitimacy

The more an institution and its methods are seen as legitimate by the public, its learners, governments, and other institutions, the easier will be its relationships with government and with society in general. If its policies, purposes, and methods are very different from those of conventional education, it is likely to be seen as a second best alternative. The quest for legitimacy may drive an institution to increasing rigidity in its course offerings, entrance requirements, and so on.

3. Sources of funding

Mobilising sources of funding for open and distance learning provision inevitably involves managers in competition and other politically charged activities. A number of sources of revenue exist, each with a different implication for managers.

3.1 Government funding

Government subsidies are a source of revenue over which institutions have little control.

Institutions must compete with each other for an equitable share.

- Government funding and its corresponding control over the institution may severely limit an institution's ability to generate revenue or market its product.
- Government funding may also create a dependence on this principal revenue source.
- Government funding may be variable because of other government priorities.

Many governments fund education on an enrolment-driven formula.

- An enrolment-driven formula makes it easy to estimate revenues within a reasonably narrow range; but on the other hand it may mean dealing with formulas based on questionable assumptions.
- For example, governments may assume that unit costs at all institutions are the same. Open and distance learning have a unique cost structure, however, with few if any classrooms and higher course development costs.
- In order to fit the formula, open and distance learning providers may have to use arbitrary equivalents, such as the 'full-time equivalent' student, or FTE.

If funding is based on submissions from institutions, then the expenditure plan — the budget — becomes a powerful document and must be carefully prepared, as part of an institution's strategic plan.

3.2 Tuition fees

Tuition fees are usually the second-largest revenue source; therefore estimating fee revenue accurately is extremely important.

Determining a reasonable tuition fee can be a difficult task and may involve several factors, not all of which are compatible. Some such factors may be:

- government policy;
- revenue needs;
- market elasticity (how much enrolments are affected by the price of the course);
- mission of the institution; and
- comparison with other institutions.

Discussion: You might wish to ask your participants the following questions: Can you think of other factors? How are fees set in your institution?

3.3 Ancillary operations

Open and distance learning institutions can generate substantial revenue from activities outside the normal course delivery. Example of such activities include:

- *textbook sales*: for example, Athabasca University has turned course books into textbooks for sale through a commercial publisher;
- *course material sales*: for example, Indira Gandhi National Open University, like many other open universities, makes its materials available to other institutions for a fee;
- *consulting fees*: for example, Open University World Wide in the United Kingdom realises revenue for the Open University through overseas and domestic consulting and training activities; and
- *charging out their facilities*: for example, the Sudan Open Learning Organisation realises considerable revenue from selling printing services to other agencies.

Budgeting and costing are particularly important for these operations, so that markups are properly determined. Unless such activities can generate a reasonable net income or return on investment, they may not justify the effort put into them, especially if there are substantial fixed and indirect expenses.

If care is taken, however, income from such operations may be available to improve the quality of the mainstream operations, and there may be fewer restrictions on its use.

Internally generated revenues may also be important from a political perspective. An institution that generates its own revenues may be viewed favourably by its government funding sources.

3.4 Other revenue

The most important type of revenue in the 'other revenue' category is likely interest earned on short-term investment of cash temporarily surplus to operating requirements. Budgets form the basis for a cash management system.

Solicitation of donations and endowment funds can be very important also, but are usually reserved for specific purposes.

Discussion: Ask your participants how their institutions earn additional revenue.

3.5 Capital funding

For an educational institution to maintain and improve its services, capital funding is required.

Capital funding requires substantial amounts of money concentrated in a short period. Unless the institution has the power to finance its own capital programme, it usually depends on either government or fund raising, neither of which is necessarily an assured funding source.

A capital budget becomes important as a vehicle to present capital requirements, usually over a three- to five-year period. It should cover both equipment and building replacement, as well as innovative technology.

Discussion: Ask your participants to list the sources of revenue in their own institutions and the proportion of each. How do these proportions affect strategies for obtaining funding? What are some other possible revenue sources? Are there advantages in becoming less dependent on the major revenue source? This activity should take about 30 minutes.

4. Collaboration

4.1 Terminology

Collaboration in open and distance learning contexts is taken to mean individuals or institutions working together for mutual benefit, typically as a way of pooling resources for their maximisation.

Collaboration can take place:

- within and between nations;
- between different distance teaching institutions; and
- between distance teaching institutions and conventional teaching institutions.

Examples:

AMREF, the African Medical Research and Education Foundation;

INADES, the African Institute for Economic and Social Development; and

Canada's 'Knowledge Network', in which a satellite broadcasting facility was set up to serve several teaching institutions on the west coast.

4.2 Motives for collaboration

Six arguments that are often used for collaboration are:

- *economic efficiency:* Joining together can reduce costs per unit and promote internal and external efficiency;
- *technological:* For the industrialised world in particular the technical infrastructure for collaboration — telecommunications — is in place. For both industrialised and developing countries, institutions can band together to share the costs of major infrastructure support;
- *equity and access:* Schemes that involve collaboration between an institution in a developed country and an institution in a developing country are becoming increasingly popular as ways of assisting developing country institutions to

implement open and distance learning in order to make access to education available to as broad a range of people as possible;

- *quality*: It is argued that collaborative course development can result in a better product, by providing access to resources that are not normally available, involving a wider group of professionals, making available a wider range of course offerings, and maintaining wider bases of information and resources;
- *moral and philosophical*: Collaboration helps to promote and sustain international dialogue, foster international harmony, and increase understanding and world peace; and
- *political*: Access to education is always an important political issue, along with the need to achieve increased efficiency through close integration and rationalisation. Collaboration has been encouraged to foster both these ends.

Discussion: Are there other motives, in your and your participants' experience?

4.3 Evaluating opportunities for collaboration

Because collaborative initiatives often encounter unexpected difficulties and costs, we need to evaluate arguments like the ones listed above.

Here are some questions to ask when considering any collaborative initiative:

- Does it make better or more extensive or new uses of resources that are available within one or more communities?
- Does it provide an opportunity to improve the quality of learning materials?
- Does it increase educational opportunities for a wider learner population while retaining its relevance to learner needs?
- Does it provide a useful response to political pressures of various kinds?
- Does it relate effectively to a perceived need to guide or initiate changes of various kinds in particular societies?

Discussion: Apply this list to a collaborative venture you or your participants know well.

4.4 Models of collaboration

Three broad elements can be distinguished in collaborative activities:

- *type of exchange*: is it a transfer (one-way) or a pooling (two-way) type of exchange?
- *level of development*: does the exchange involve institutions or countries of the same or different economic levels?

- *source of finance*: is the activity internally financed (by the institutions themselves) or externally financed (by governments or donor agencies)?

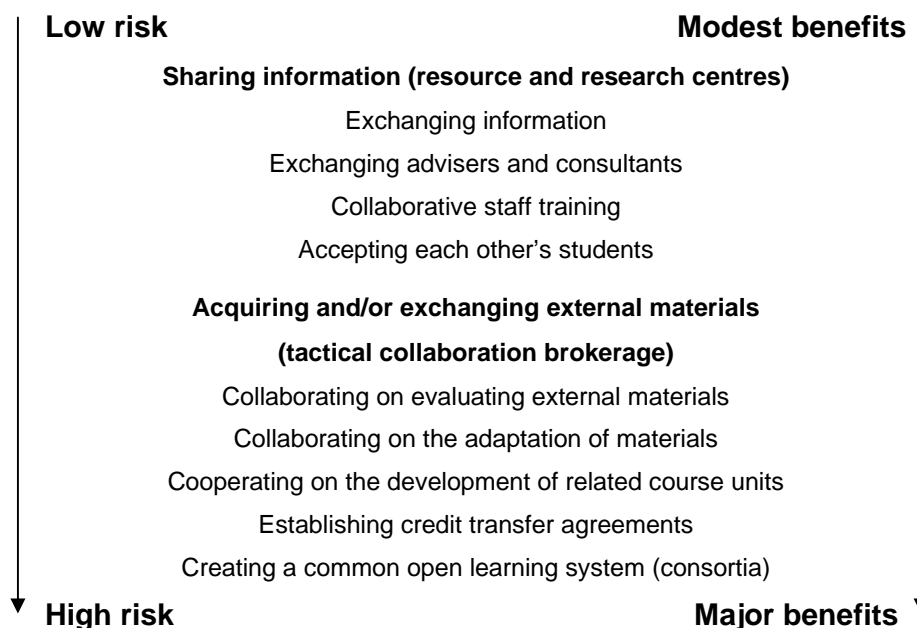
Collaboration can also take place on a number of levels:

- *information-sharing*: individuals, institutions, and systems exchange information about learners, programmes, academic publications, and operational activity; for example, the International Centre for Distance Learning (ICDL) database;
- *tactical collaboration*: involves a formal agreement between two or more institutions to develop, deliver, or both develop and deliver materials for mutual benefit; for example, brokerage of materials from other institutions to meet your needs. For example, Napier University in Scotland delivers courses in Mauritius, as described in the case study which is in this kit;
- *consortia*: characterised by a formal partnership, joint allocation of resources, and an independent managing agent. Institutions set up formal agreements that may involve co-production of elements of a course, complete joint course production, joint learner enrolments, or cross accreditation and credit transfer; and
- *mergers*: characterised by the creation of a new entity out of previously independent entities. For example, the case study included in this kit for Deakin University describes the merger of institutions delivering open and distance learning that has taken place in Australia; the case study for Charles Sturt University also refers to issues surrounding the merger of two institutions.

4.5 Risks and benefits

We can identify a hierarchy of collaborative initiatives in terms of the complexity, risks, difficulties, and benefits involved.

Risks and Benefits of Collaborative Initiatives



The risk of failure increases along the progression shown by the arrows, because of:

- the degree to which the participants may be required to change their existing systems and practices; and
- the increasing extent to which the comparative assessment of existing standards is required.

The benefits increase, because of the potential for increased

- cost savings;
- learner interchanges between countries; and
- commonality of standards.

4.6 Problems of course transfer and co-production

Tactical collaboration involves the transfer of resources. Two ways in which resources are transferred are *course transfer* and the *co-production of learning materials*. Here are some of the problems associated with these practices.

Course transfer

Institutional administrative problems:

- availability of suitable materials;
- copyright and ownership of materials; and
- pricing policies.

Academic problems:

- appropriateness of language or treatment of subject matter;
- appropriateness of credit weighting;
- difficulty of fitting new course into existing programme structures;
- materials reflecting a different culture;
- appropriateness of academic level; and
- congruity of delivery requirements with proposed system of home institution.

Sociocultural problems

- validity and cultural relevance of knowledge, skills, and attitudes;
- whose history counts; and
- appropriateness of pedagogy.

Discussion: Take advantage of the wealth of examples available both from your own and your participants' experience. Take a look at the Napier University case study that is part of this kit.

Co-production

Problems involved in the joint activity of two or more institutions in producing materials that they will all use include:

- agreement over who should produce what and to what standard;
- learner entry requirements;
- problems of training academics to work with unfamiliar media;
- academic and administrative procedures and control;
- obtaining permissions to adapt existing material;
- reconciling needs of different audiences;
- meeting recruitment targets;
- maintaining full consultation and collaborative decision making;
- specifying agreements in sufficient details to ensure all parties aware of responsibilities; and
- staying within budget.

4.7 Sustaining effective collaboration

The following principles and guidelines can help partners achieve effective collaboration that can be sustained over time:

- Collaboration schemes should always be between institutions, with institutional backing guaranteed.
- Where feasible, an institution receiving advice or technical assistance from another institution should attempt to cover the costs from within its own resources or propose some other service in exchange.
- Where the help and backing of aid agencies is sought, every effort should be made to persuade them to facilitate inter-institutional partnerships rather than parachuting in outside consultants.
- Institutions should examine the regional and local potential for collaboration before seeking help from elsewhere.
- Efforts should be made to redress the unequal flow of transfers between the developed and developing countries; for example, by creating an international centre to provide facilities and services not covered by the regional centres.
- Emphasis should be on training the trainers, who can modify as necessary the required techniques and organise their own in-house training.

- Use distance communication methods as a vehicle for the transfer of knowledge wherever possible.
- Promote exchanges of staff between institutions, aiming at an equilibrium of exchange visits.

Discussion: Ask participants if they have any ‘hints’ to add to this list from their own experience.

5. Quality assurance

5.1 Why the concern with quality assurance?

While *quality assurance* may be a recently applied term in the educational context, there is nothing new about educational organisations’ undertaking systematic review and inspection of products and services to ensure their quality.

More recent use of and emphasis on the label, *quality assurance*, can be attributed to factors such as the following:

- governments’ interest in return on public investment in education relative to other areas of expenditure;
- the assertion that education and training is essential to economic recovery, growth, and competitiveness;
- the assertion that the institutions responsible for education have failed in their mission in the recent past to meet demand because of ivory tower or anti-business attitudes; and
- insistence that education costs should be reduced and educational organisations made more accountable.

Discussion: Does this list of external factors fit with your participants’ experience? Do they have other factors to add?

5.2 What do we mean by quality?

Discussion: Begin this discussion by distributing pieces of paper, one to each participant, and asking participants to write down — in letters large enough to be seen by the group — their definition of *quality* in an educational setting. When participants have finished, ask one of them to collect the sheets and pin them up in front of the group. Draw out the features common to them all, point out the differences, and ask whether any features can be added.

The features mentioned might include the following:

- chosen standards or criteria;
- the relative nature of quality;
- services as well as products;
- perceptions as well as measured outcomes; and
- relevance.

What is involved in assuring quality?

Additional points to be made might include the following:

- Everyone agrees on the desirability of quality.
- There is less agreement, however, on what it is.
- This is because 'quality' does not exist in isolation from its context of use.
- Also, judgements differ according to whose views are being sought; for example,
a variety of different meanings define *quality*;
different stakeholders have different perspectives on quality; and
different functional areas within a single organisation have different views.
- Priorities will vary according to
who is making the assessment; and
for what purposes the assessment is being made.

5.3 Checklist for a quality assurance programme

Quality assurance focuses attention on operational processes and systems. It has three main elements:

- You set standards for a product or service.
- You organise the production or delivery of a product or service so that the standards are consistently met.
- You thereby create confidence in the client or recipient that what is promised is what will happen.

To implement these procedures, it is helpful to ask the kinds of questions in the following quality assurance checklist (Robinson 1994:187–188).

Quality Assurance Checklist

Quality policy and plan

- Has your organisation developed a policy on quality with which all staff are familiar?
- Has this been translated into a practical plan?

Specification of standards

- Are there specified and clearly defined standards in place?
- Have they been communicated to all concerned?
- Are they specified for key activities?
- Are they
 - achievable?
 - reasonable?
 - measurable?

Identifying critical functions

- Have the critical functions for achieving the standards been identified?
- Have they taken the learner as the starting point?
- Have the procedures to achieve them been analysed?

Documentation

- Are the procedures to be followed clearly documented?
- Are they explicit?
- Do they represent fact or fiction?
- Are they consistent in different documents?
- Are they concentrated on essential procedures?
- Are they in a readable and user-friendly form?
- Do all those who need them have access to copies?

Staff involvement

- Have all staff been involved in the development of quality assurance systems?
- Have their suggestions been built in?
- Has enough time been given to this process?

Monitoring

- Are there systematic monitoring mechanisms for critical functions?

- Do they check whether standards are being met and procedures followed?
- How do you know?
- Are the findings disseminated?
- Are they harnessed to appropriate action?
- Do they result in improved performance or a review of practice, or a reappraisal of standards?
- Do they provide effective feedback loops between providers of products and services and learners or clients?

Training

- Is there adequate provision of training and staff development?
- Is this linked to the achievement of standards?
- Are there effective mechanisms for assessing training needs?
- Are these reviewed regularly?
- Are resources allocated to meet them?

Costs

- Is there a strategy for monitoring the costs of implementing and maintaining quality assurance activities?
- Does this strategy take account of human and financial costs?
- Are the costs greater than the benefits?
- Is there a review process to find out?

These and other issues to do with quality assurance are dealt with in greater detail in Performance Indicators, Topic 9 of this kit.

Discussion: Ask participants to read and compare the sections on quality assurance in the following nine case studies: Deakin University, Murdoch University, the Open Access College, Charles Stuart University, University of Guyana, Indira Gandhi National Open University, University of the Philippines Open University, and the Southern Africa Extension Unit. What appear to be the definitions of *quality* used by these institutions? What procedures do they use for assuring quality?

6. Practice exercises

6.1 Domains of power

Instructions: Ask each participant to spend about twenty minutes setting down briefly for the case of their own institutions the following items:

- *the groups that exercise power over the institution*: for example, government, donors, staff, learners, and other institutions
- *the kind of power they exercise*: coercive, funding, or policy;
- *the relative impact of this power on the organisation's operations*: in other words, ranking the groups in terms of the weight they have in determining or influencing the directions in which the organisation can move.

Supply participants with a chart something like the following to guide their work. Divide participants into small groups (no more than five people each) to discuss and compare their analyses. Close with a general discussion of the outcomes. Are participants' experiences of power quite similar or very different, and what accounts for these similarities and differences?

Group exercising power	Type of power exercised	Relative weight (5 = most powerful, 1 = least powerful)

Timeframe: Allow 20 minutes for individual work, 40 minutes for small group discussion, and up to 30 minutes for large group discussions; or, in total, up to one and a half hours.

Materials: Prepared hand-outs, flip chart paper and pens.

6.2 Collaboration role play

Instructions: Ask participants to consider the following scenario.

Three institutions are collaborating on the co-production of a new and innovative, degree-level programme in nursing. The three institutions are:

- A prestigious university, which sees itself as the lead institution. The university also realises, however, that it would not have won the funding that is supporting this project without the collaboration of the other institutions because it does not at present offer any nursing courses nor does it do much distance delivery;
- A community college, which sees itself as having the subject matter expertise here because it does have a nursing diploma programme with a good reputation. It is only a two-year programme at the moment, however, and the new programme is to be university degree-level, to which credit from the existing college courses is to be transferable.
- A technical institute, which sees itself as the technical expert in open and distance learning because it has been doing distance delivery, using a wide variety of electronic media, for over a decade. It does not have any subject-matter expertise to contribute, however.

Choose six people from among your participants (volunteers or names drawn out of a hat) to be representatives to a meeting, two from each institution. One of each pair is evidently more senior than the other, with the junior person actually more knowledgeable about the topic under discussion but with less authority to make decisions. They are sitting around a table in a board room at the university. Their task is to reach an agreement on the roles each institution is to play in this project.

Timeframe: Allow the discussion to go on for about 20 minutes. Encourage the 'players' to take extreme positions. Then follow the role play with a discussion of what problems were being portrayed, the extent to which these are typical problems in collaborations of this sort, and how these problems could be solved or even averted.

The entire exercise should take about 40 minutes.

Materials: None required.

TOPIC 3

Structures of Open and Distance Learning

Overview

Source materials for this topic

The uses of open and distance learning

Basic education

Teacher training

University level

Non-formal education

Technical and vocational training

Structures of open and distance learning

Single mode institutions

A department within an existing teaching institution

Co-operative arrangements

Hybrids

Factors for choosing a structure

The scale of the educational need

Educational purpose

Resources available

Degree of autonomy and control

Is there a 'best buy' ?

Practice exercise

Classifying open and distance learning providers

1. Overview

These materials assume that you have introduced your participants to the concept of open and distance learning and discussed the political context in which open and distance learning programmes become established. On this basis, the intention of this section is to support a more detailed discussion on the topic of the various operational structures used in open and distance learning.

The discussion of operational structures is in four parts:

- uses for open and distance learning;
- administrative structures for open and distance learning;
- factors to consider in choosing one of these structures; and
- whether there is a ‘best buy’ among these structures.

The intention here is to prompt discussion among your participants of the kinds of open and distance learning structures they are using or considering, and why they have chosen those operational structures.

1.1 Source materials for this topic

Perraton, H. *Administrative structures for distance education*. London: The Commonwealth Secretariat and The Commonwealth of Learning, 1991.

Mugridge, I. (ed.) *Distance education in single and dual mode universities*. Vancouver: The Commonwealth of Learning, 1992.

2. The uses of open and distance learning

Open and distance learning is provided at five main educational levels.

2.1 Basic education

Open and distance learning used for providing basic education in the form of

- second-chance programmes for adults; and
- programmes for school-age children.

Examples: The Open School was set up in India in 1979 to accelerate the provision of basic education for all and to serve as a model of cost-effective alternatives to secondary education.

The Open Access College in Australia provides courses for both children and adults. (See the case study in this kit.)

2.2 Teacher training

Teacher training is one of the most widespread purposes for which open and distance learning has been adopted, due to:

- the huge demand for education and a consequent shortage in the supply of teachers;
- the ability to retain teachers in their schools, save on resources, and bring immediate benefits to classrooms;
- the fact that teachers are assumed to already possess study skills and therefore are likely to succeed as distance learners;
- the ability of school boards to provide teachers with motivation to study (for example, promotions and wage increases); and
- the ability to overcome the problems teachers face in remote schools.

Teacher training at a distance has taken three forms:

- upgrading of existing primary school teachers;
- initial training of primary teachers; and
- upgrading of secondary school teachers.

Examples: The Emergency Science Programme in Guyana, the Northern Integrated Teacher Education Programme in Uganda (NITEP) and the Strengthening Primary Education in Kenya (SPRED II).

A number of institutions offer teacher training at a distance. Three institutions — University of Guyana, University of Nairobi, and the University of Botswana — describe their teacher training programmes in case studies in this kit.

2.3 University level

At the university level, open and distance learning may be offered through:

- single mode institutions;

Example: Indira Gandhi National Open University and the Open University of Sri Lanka as discussed in the case studies in this kit.

- bimodal institutions;

Example: Open Learning Institute of Charles Sturt University, the University of Botswana, the University of Guyana, the University of Nairobi, Massey University, the University of Zambia as discussed in the case studies in this kit.

- mixed mode institutions; and

Example: Deakin University and Murdoch University as discussed in the case studies in this kit.

- consortia and other co-operative arrangements.

Example: The Commonwealth of Learning.

2.4 Non-formal education

In non-formal education, open and distance learning is offered in the following areas:

- rural and social development;

Example: INADES, *l'Institut africain pour le développement économique et social-formation* in Côte d'Ivoire.

- literacy; and

Example: the radio schools of Latin America.

- health.

Example: AMREF, The African Medical Research and Educational Foundation.

2.5 Technical and vocational training

For technical and vocational training, open and distance learning includes

- workplace-based learning; and
- employer-sponsored schemes.

Discussion: Contribute other examples of open and distance learning applications from your own and your participants' experience, and from the institutions described in the case studies included in this kit.

3. Structures of open and distance learning

An open and distance learning programme can be set up in a number of ways. At the risk of over-simplification, these alternatives can be described in terms of the following organisational arrangements.

3.1 Single mode institutions

A *single mode* institution operates with a *free-standing* structure, assuming that the institution will itself undertake most of the following functions:

- designing education programmes, including acquiring and developing teaching material;
- tutoring and counselling;
- awarding credit (in formal education programmes);
- producing, storing, and distributing learning materials;
- keeping records of learners, inventory, and finance;
- providing administration and finance;
- marketing programmes and recruiting learners; and
- evaluating programmes and processes.

The free-standing operational structures of single mode institutions:

- are usually autonomous; and
- have open and distance learning as their dominant or sole function.

They can be categorised into two types.

Single purpose, single mode institutions

- Some open and distance learning colleges have been set up to teach a single subject, especially for teacher training.

Example: William Pitcher College in Swaziland was established to provide open and distance learning courses for the in-service training of teachers.

Multi-purpose, single mode institutions

- open universities;

Example: Indira Gandhi National Open University in India, the Open University of Sri Lanka, and the Open University in Britain.

- open colleges, which offer courses at a number of levels; and

Example: the Open Access College as discussed in the case study in this kit, the Tanzanian National Correspondence Institute, and the National Extension College in Britain.

- open schools.

Example: the National Open School of India and the Open Access College as discussed in the case study in this kit.

Arguments for a purpose-built system that teaches only at a distance include the following:

- the administrative structures of conventional educational systems are not the most suitable ones for developing and managing open and distance learning systems;
- conventional institutions may regard open and distance learning as a poor relation and consequently be reluctant to allocate it adequate resources;
- the requirements of distance learners are likely to be better served if the institution is wholly dedicated to their needs;
- the characteristics of the target audience are significantly different from those of campus based learners (for example, adults have distinctive approaches to learning compared with young people at the tertiary stage of learning);
- the pedagogy of open and distance learning is different than that of conventional systems; and
- significant innovation is more likely to occur outside the framework of traditional educational institutions.

Example: These distinctions were true of the early days of the open universities of the United Kingdom and the Netherlands.

Discussion: Feel free to disagree with these arguments, or to add to them.

3.2 A department within an existing teaching institution

Many universities or colleges decide to set up a distance learning department that works alongside other departments, specialising in open and distance learning but within an otherwise conventional institution.

Arguments for such *bimodal* or *dual mode* institutions include the following:

- the structured learning materials prepared by course teams provide consistent quality of instruction to both off-campus and on-campus learners;
- self-instructional materials encourage learning through activities and independent learning;
- learners are liberated from the constraints of the traditional lecture and tutorial system, and can move from one mode to another according to their needs;
- learners benefit from the esteem that comes from a conventional university and demonstrated parity of standards; and
- staff are freed to teach in more interactive ways.

Bimodal structures can take two forms.

Subject-oriented departments

Subject-oriented departments teach externally in their own discipline.

Example: At the University of the South Pacific the Department of Education launched the first open and distance learning programmes for teacher education before the university began to teach at a distance in other subjects.

Distance education departments

Distance education departments take the main responsibility for planning and running open and distance learning within a bimodal institution.

Examples: The Distance Education Unit of the University of Botswana, and a number of 'institutes', such as the Institute of Distance and Continuing Education of the University of Guyana, the Institute of Distance and Continuing Education at the University of Papua New Guinea, and the Open Learning Institute of Charles Sturt University, as discussed in the case studies in this kit.

Variants within this structure include:

- distance education departments that are purely administrative with no teaching functions;

Example: The University of Zambia can require staff to teach both face to face and at a distance but the specialist department only co-ordinates and distributes materials.

- specialist open and distance learning departments that have a pedagogical function; and

Example: Murdoch University had at one time a specialist department that did not employ its own subject specialists but had staff with educational skills in open and distance learning who played a role in the development and use of materials that went beyond the purely administrative; and

- external teaching departments with their own subject-specialist staff concerned solely with external learners.

Example: The University of Wisconsin Extension has a staff of well over 1000 and a full range of academic departments but exists in parallel with the University of Wisconsin.

3.3 Co-operative arrangements

In a co-operative arrangement for open and distance learning, institutions work together to teach and support learners and distribute the various functions between them.

A distinction can be drawn between two types of co-operative arrangements.

National co-operative structures

- The functions of preparing materials, giving tutorial support to learners, and awarding credit may be carried out by different partners.

Examples: The Chinese Television University produces materials that are used by a federation of universities who provide tutorial support to back the centrally produced courses.

The National Extension College in the United Kingdom produces 'flexi-study' packs of learning materials, which colleges can purchase for their own use, with advice from the NEC on running open and distance learning programmes.

The University of Lincolnshire and Humberside have franchised their courses to other universities.

The Open Learning Foundation is a consortium of tertiary level institutions in the United Kingdom which produces course material packs that are available at a discount to member institutions and at full-price to non-member institutions.

- Co-operative arrangements need not be permanent or all-purpose.

Example: In Australia three universities co-operated on the development and running of a degree-level course in women's studies, in a situation in which it would have been difficult for any one of them to offer the course on its own, and in which the universities were not working together on their whole range of programmes.

International co-operative structures

- Co-operation is also possible across national frontiers.

Example: Commonwealth Heads of Government agreed in 1987 to set up The Commonwealth of Learning in order to promote co-operation in open and distance learning within the Commonwealth and to facilitate the sharing of resources among Commonwealth colleges and universities.

- Several other institutions have been established to promote international co-operation in open and distance learning.

Examples: CIFFAD, the *Consortium international francophone de formation a distance*, set up with support from Canada and France with broadly comparable objectives to those of The Commonwealth of Learning;

CREAD, the *Consortio-red educacion a distancia*, which links open and distance learning organisations throughout the Western Hemisphere; and

EADTU, the European Association of Distance Teaching Universities, working on the sharing and joint development of teaching material.

To date, these organisations are not enrolling learners directly but are providing services to support the work of national institutions.

3.4 Hybrids

The operational structures outlined above are somewhat arbitrary, and there are both possible and actual hybrids among them.

For example, in several cases an institution has broader functions than this account of structures might suggest.

Examples: The Indira Gandhi National Open University serves both as an autonomous institution and a co-operative body in that it has co-ordinating and funding responsibilities for the other Indian open universities.

The Lesotho Distance Teaching Centre and Tanzania National Correspondence Institute are multi-purpose institutions but in their teacher education programmes work within a co-operative framework that might be labelled a 'national co-operative' structure.

In addition, an open and distance learning programme may be mounted by an organisation that is quasi-autonomous and free-standing in some ways but not in others because it is one component of a multi-campus, state-wide, or nation-wide institution.

Examples: The Open University of the Philippines is one of six universities that comprise the University of the Philippines as discussed in the case study in this kit.

The Tele-université of Québec is one institution among several that comprise the Université de Québec.

Empire State College in New York is part of the SUNY – (State University of New York) system.

Yet another variant is the open and distance learning programme that is not yet institutionalised but is rather organised as a project, usually under the auspices of a government ministry, which may or may not eventually become an established component of the overall provision of education overseen by that ministry.

Examples: Several upgrading schemes for primary teachers are operating under the auspices of ministries of education, as projects funded by donor agencies, and not yet formally institutionalised. Examples include NITEP (Northern Integrated Teacher Education Project) in Uganda and the SPRED projects (Strengthening of Primary Education) in Kenya both offer upgrading schemes for primary teachers.

Athabasca University in Canada operated as a project of the government of the province of Alberta for a number of years before being chartered as the province's fourth university.

Discussion: Are there arrangements in your own and your participants' experience that do not easily fit in any of these categories?

4. Factors for choosing a structure

Of these various organisational structures, no one way is 'best'. Rather, the choice of organisational structure depends on a number of factors, including educational goals and political and economic circumstances. Four factors that influence the choice of structure are discussed here.

4.1 The scale of the educational need

If the intent is to recruit learners in large numbers, it may be unrealistic to consider anything other than an open university with a full range of functions.

Example: Several open universities are labelled 'mega-universities' because they enrol one hundred thousand learners or more. Examples include the Indira Gandhi National Open University as discussed in the case study in this kit, Sukhothai Thammathirat Open University in Thailand, Universitas Terbuka in Indonesia, and the Open University of the United Kingdom.

On the other hand it would not make sense to set up such an institution if the intention was to recruit only a thousand learners.

Example: In Malaysia, doubts about the viability of degree-level open and distance learning led to the choice of a bimodal approach with the off-campus programme of Universiti Sains Malaysia recruiting learners in hundreds rather than thousands.

4.2 Educational purpose

If the purpose is narrowly defined — for example, the upgrading of primary school teachers — the choice is likely to be limited to a single purpose, distance learning institution, a department within an existing institution, or a co-operative scheme.

The level at which the scheme is to work will also be important. For example, it may be difficult to set up a unit within another institution if the parent institution has no experience in teaching at the level concerned. There are significant exceptions, however.

Example: The Matriculation Programme for Women is a successful offering of Allama Iqbal Open University in Pakistan, and the University of Nairobi successfully housed a unit working at secondary level for many years.

4.3 Resources available

The level and nature of the human, physical, and financial resources likely to be available also affect the choice of structure.

Example: Small countries with a limited educational infrastructure that already have difficulty in staffing a single conventional university are likely to have difficulty finding the staff for a separate open university.

When populations are low it is difficult to achieve the economies of scale that make open and distance learning attractive. Small states are likely to be constrained in the way they use open and distance learning. At the same time, the isolation of small island countries suggests a role for open and distance learning in providing educational resources that would not otherwise be available.

Examples: Countries in the Caribbean and the South Pacific have been able to resolve the dilemma of low learner populations by calling on the resources of the two regional universities, both of which have launched programmes of open and distance learning.

The University of Namibia is extending the reach of its programmes in this large but sparsely populated country by giving the Centre for External Studies the mandate to offer its highest demand courses at a distance.

The price of this association may be that a unit teaching at a distance in one of these countries lacks the autonomy that may be enjoyed by institutions in larger countries.

4.4 Degree of autonomy and control

If we classify the structures according to the degree of autonomy they allow the open and distance learning programme, then open universities lie at one end of the scale and some of the co-operative schemes at the other.

Political realities are important to consider. There may be a political commitment to establishing a single mode or free-standing institution that could not be met by any other alternative. Or such an establishment may be strongly opposed by other educational or political interests and thereby rendered impossible.

Ease of access to services from other institutions may determine how far it is desirable or realistic to seek a degree of autonomy or co-operation.

Examples: The case study for the Open Learning Institute of Charles Sturt University describes the challenges of the politics involved in collaborative arrangements with other institutions.

The Open Learning Institute of British Columbia (now the Open Learning Agency) decided from the outset to seek its subject-matter expertise primarily from the many tertiary level institutions that were already operating in the lower mainland of the province, rather than to hire permanent academic staff. This reliance on academics in other institutions could be seen as a form of dependence. On the other hand, it could also be seen as a form of collaboration with other institutions that helped establish the OLI's legitimacy as a provider of university-level programmes.

- An organisation may wish to control some aspects or functions of the open and distance learning task and not others.

Example: If the same organisation plans to develop teaching material and provide tutorial support for it, then it is likely to choose one of the bimodal structures.

- If on the other hand it plans to concentrate on the production of material and leave tutoring to a more local organisation, a co-operative structure will have its advantages.

Example: The Open Learning Institute in Hong Kong has developed co-operative arrangements with other institutions of tertiary education in Hong Kong to provide tutorial support for its learners, and works with universities outside Hong Kong from which it is buying teaching materials. It also develops some teaching materials in-house.

Who has control over and responsibility for teaching is a major issue in bimodal organisations. When open and distance learning units are only administrative, control over what is taught at a distance, who teaches it, and to a large extent how it is taught remains in the hands of the academic units.

It is more often argued, however, that the development and production of good learning materials and the provision of tutorial services requires specialist skills that are somewhat different from those needed for conventional teaching. This leads to the variant in which open and distance learning units have staff with these skills to work with the academics, led by managers who have among their tasks negotiating with academic units and persuading them to offer some of their courses at a distance.

Discussion: The case study for the Women's Studies programme at Massey University in New Zealand offers a comparative account of the differences between offering this programme at Massey, a bimodal institution, and at Athabasca University in Canada, a single mode institution.

4.5 Is there a best buy?

Given the complexities of political context, needs, and resources, there is no consensus on a best buy among the structures as discussed.

Some conclusions can be drawn, however, as follows.

- Open universities have a record of success that compels attention.
- Bimodal institutions appear to be most successful when
 - they have established a well-supported open and distance learning unit; and
 - they have their own educational staff who bring pedagogical expertise to developing open and distance learning.
- Single purpose or single subject departments and institutions appear to have evolved into broader institutions or to have closed down, suggesting they are most appropriate for doing a specific job over a limited period of time.
- While many educators have expressed scepticism about co-operative structures, their potential for harnessing resources makes them of long-term significance nationally and internationally.

5. Practice exercise

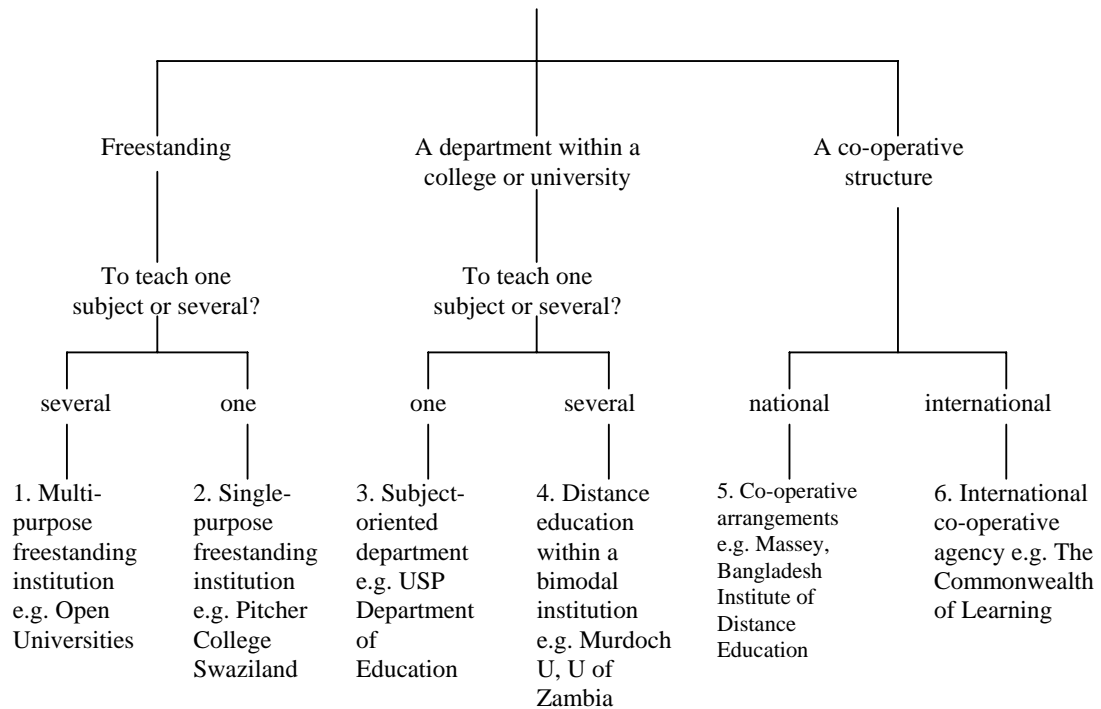
5.1 Classifying open and distance learning providers

Instructions: Provide each participant with a copy of the following classification chart for the structures of open and distance learning organisations. Ask each participant to identify as far as they can how their own organisation should be classified (allow about 20 minutes). Then have participants pair up and discuss their classifications with their partners (allow 20 minutes). In the subsequent whole-group discussion, draw out the difficulties they encountered while classifying their programmes, and discuss why these difficulties exist.

Time required: Approximately one hour.

Materials required: Enough copies of the classification chart to provide one copy per participant.

Do you want a freestanding institution, or a distance-education department within a college/university, or a co-operative structure?



Models of distance-teaching institutions

TOPIC 4

Managing Open and Distance Learning Programmes

Overview

Source materials for this topic

Issues in managing open and conventional programmes

Systems thinking

Staffing

The staffing mix

Training staff

Monitoring and supporting staff at a distance

Teamwork

Managing project teams

Networking

Quality assurance

Quality assurance as a management system

Evaluating programme performance

Practice exercise

Putting management issues in context

1. Overview

These materials support discussion on the topic of the operational issues that confront open and distance learning providers.

The section opens with a list of the similarities between open and distance learning programmes and their more conventional counterparts. This list is only a beginning, and could be expanded during discussion with participants about features that are common to all education programmes, regardless of mode of development or delivery.

The remainder of the materials focus on ten operational issues that are of particular concern to managers of open and distance learning programmes.

1.1 Source materials for this topic

Bates, T. *Technology in open learning and distance education: a guide for decision-makers*. Vancouver: The Commonwealth of Learning and the Open Learning Agency, 1991.

Moore, M., and G. Kearsley. *Distance education: a systems view*. Belmont: Wadsworth Publishing Company, 1996.

Paul, R. *Open learning and open management*. London: Kogan Page, 1990.

Snowden, B., and J. Daniel. The economics and management of small post-secondary distance education systems. *Distance Education I*: 1, [pp. 68-91] 1980.

2. Issues in managing open and distance learning programmes

Managers of open and distance learning programmes face the same challenges as the managers of learning programmes delivered in more conventional, face-to-face settings:

- both aim to provide an education that is relevant and of high quality;
- both aim to offer and achieve certain minimum standards of education and training;
- both have administrative systems that enrol learners and register them on their chosen courses; and
- in the case of conventional programmes, both usually require learners to sit examinations before receiving certification.

However, open and distance learning programmes and conventional programmes have several differences. Specifically, open and distance learning programmes:

- often tend to be 'open' programmes, concerned with improving access and with democratising education, as contrasted with maintaining education as a privilege of the elite;
- drop or lower the academic entrance requirements that conventional programmes typically require if they are also open programmes;
- have the same exit or graduation requirements as conventional programmes even though, because of their openness, they may accept learners with fewer formal qualifications, which creates a situation that places even greater demands on those providing tuition and learner support;
- tend to deliver their courses using a mix of technologies and media; they almost always include some print materials, but these are supported by a variety of electronic media, including radio, television, audio and video cassettes, computers, and telecommunications;
- are typically supported by part-time tutors and counsellors who may be employed by conventional institutions;
- frequently require collaboration with other programmes and agencies to provide learning materials, course development and delivery personnel, facilities, or all of these;

- tend to need larger administrative bodies that accommodate a greater diversity of functions; and
- must remain open, flexible, and innovative in response to learner needs, a challenge that is best met by open, flexible, and innovative approaches to management.

Discussion: You will likely want to add other similarities and differences to this list. You might also involve your participants in generating a list of the characteristics that are common to educational programmes in general, and then use that list as a basis for differentiating distance programmes from conventional programmes.

These differences between open and distance learning and more conventional programmes raise a number of issues for managers of open and distance learning programmes:

- staffing for open and distance learning programmes;
- integrating media;
- managing project teams;
- analysing systems (*systems thinking*);
- collaborating with other agencies and organisations;
- centralising versus decentralising;
- planning and scheduling;
- costing and budgeting;
- monitoring and supervising staff at a distance; and
- evaluating programme performance.

Discussion: This list is intended only as a prompt for discussion. You are welcome and urged to add other operational issues.

3. Systems thinking

In the Introduction to Open and Distance Learning, Topic One of this kit, participants were introduced to the systems approach that characterises open and distance learning provision. A systems approach sets the conditions for proceeding with problem solving in an orderly way, recognising that every component and task is related to every other, and that a change in one component will bring about changes in the others. In Topic One these components were described as a series of phases:

analysis → design → development → implementation → evaluation → revision

Managing these tasks is clearly not linear, for the following reasons:

- programme staff will be involved in several of these tasks at the same time; and
- the tasks are interdependent.

Example: Decisions about the type of media to be used will depend partly on costs and partly on instructional appropriateness.

Decisions about assessment will have to be made concurrently with materials design and development.

Doing the revisions that fall out from the evaluation will involve reworking many or all of these tasks.

For this reason it can be useful to look at these phases as constituting a *management cycle*. The notion of a *management cycle* is based on the following principles:

- that open and distance learning depend equally on co-ordinated academic, administrative, technological, and learner support activities and services;
- that these services must be jointly managed through team management;
- that their effectiveness requires elaborate planning and pre-planning in order to ensure adequate early warning mechanisms;
- that it is possible to produce standardised guidelines and structures as tools to assist this process; and
- that effective communication and data exchange networks are essential for such management.

The discussion that follows collapses into four phases the six phases that were discussed in the Introduction to Open and Distance Learning in Topic One.

Pre-planning

A new programme or course emerges from within an academic unit or collaboratively from an idea or need identified from an outside agency, such as a government department. This new course idea must then be subjected to scrutiny in comparison with the institution's overall mission, its assessment of its resources according to its strategic plan, and a needs assessment study, taking into account the outside environment into which it will be launched. Only if it still seems feasible in the light of these considerations should the programme or course go ahead.

Planning and development

Two steps must be taken at the planning and development stage. The first step is a detailed preparation of the curriculum and strategy for the programme, which involves a good deal of consultation, between the academic unit and the service departments such as media, printing, and learner support, to explore the technical possibilities and the implications of the curriculum intentions. This step will result in

- a detailed curriculum for the programme;

- a media, print, and tutorial delivery plan; and
- a detailed budget estimate of both expected costs and income from student fees or other sources.

All of this information will be put together into a *development blueprint*, which will be circulated through the appropriate approval processes of the institution. See Learning Materials, Topic 6 of this kit, for a sample ‘blueprint’ document.

Once approval has been gained, the second step is to design and develop the materials. This activity is probably the most complex and expensive in the whole cycle. The curriculum must be turned into reality, involving the following stages:

- writers must be identified, recruited, trained, and supported;
- course teams, including editors, instructional designers, and media producers, must be created and sustained;
- schedules must be drawn up and agreed upon;
- the materials must be pre-tested and revised;
- the whole package must be moderated by peer academics to ensure recognised standards are met; and
- the promotional plan must be worked out and put into action.

Tools to assist in these processes include standard contract forms, and instructional design and house style manuals.

When all these tasks have been accomplished, it is necessary for senior management to make a final review to ensure that the original decision to go ahead is still justified several months later.

Production and preparation

After the final go-ahead, the materials need to be reproduced to meet the latest estimate of enrolments, both print and audio-visual. If audio-visuals are to be broadcast, they must be produced in their final form and broadcast schedules must be publicised. Parallel with the reproduction process, the distribution logistics need to be finalised and full tutorial and learner support services put in place. This will include the training of tutors and facilitators.

Delivery and evaluation

It is only at the delivery and evaluation stage that the courses are ready to be presented to learners. It is now that the tutorial and learner support services become the main players in the process. The role of academic and media developers, however, is not over. The programme must be continuously monitored, especially during its first presentation, to identify problems and possible improvements as well as to assess student progress and success. Initial monitoring may well lead to revision before future presentations. Fuller evaluation will be necessary at a later stage to guide decisions by senior management as to whether the programme should go to scale as a long-term programme or whether and when it should be withdrawn.

Discussion: A useful exercise at this point is to have participants map the planning and management cycle as it applies to their own context, indicating the units and individuals within their organisation that are involved in each phase and the ways in which they are interrelated.

In addition, suggest to participants that they read the two case studies included in this kit which discuss in some detail the importance of planning for providers of open and distance learning: the case studies from the Institute of Distance and Continuing Education at the University of Papua New Guinea and the University of Lincolnshire and Humberside.

4. Staffing

4.1 The staffing mix

The staffing mix required to implement an open and distance learning programme depends on the educational job to be done and the organisational model that has been chosen. To take an extreme example, compare the staffing needs of two completely different open and distance learning programmes.

Example: A non-formal programme of literacy work with adult villagers, supported by radio and regular study circles, will require considerably different personnel than an executive MBA programme of formal study offered by a single mode, distance learning university.

Nonetheless, personnel will likely fall into the following categories.

Educational staff

Educational staff include:

- subject specialists;
- specialists in materials production;
- specialists on tutoring and counselling;
- tutors, especially part-time tutors;
- broadcasting producers; and
- research workers and evaluators.

Example: Both of the open and distance learning programmes in the example require educational staff set out in the following table.

Staffing Needs of Two Different Open and Distance Learning Programmes

Type of staff	Literacy circle	MBA programme
subject specialist	in the teaching of reading	in management accounting
specialists in the production of materials	in producing effective flannelgraph cut-outs and literacy primers	in producing study guides in management accounting
specialists in tutoring and counselling	trainers of study circle facilitators	career advisors
tutors, especially part-time tutors	study circle facilitators	tutors communicating with learners via computer conferencing
broadcasting producers	radio programme producers	video producers for marketing the executive MBA programme and recruiting volunteers

Materials production staff

Materials production staff include:

- printers;
- copy editors;
- graphic designers;
- broadcasting technicians;
- typists and word processing clerks; and
- desktop publishing specialists.

Administrative staff

Administrative staff include:

- administrators and managers;

- personnel staff;
- financial staff;
- records clerks;
- secretaries and typists;
- warehousing and dispatch staff; and
- messengers, drivers, and janitors.

4.2 Training staff

Arrangements will also be necessary for the training of staff, which may be done

- on the job;
- through short courses at the institution;
- by sending learners on full-time or part-time courses; or
- by enrolling them in an appropriate course taught at a distance.

The choice of organisational model will influence the training strategy.

Example: Within a bimodal institution, where a course writer is combining that role with teaching courses face-to-face, sensitivity is needed in arranging courses for experienced university course writers on how to write learning materials for use at a distance.

Within a single mode institution, which contracts course writers from other, conventional institutions, the same kinds of sensitivity will be required in training, as well as even greater flexibility in timing the training sessions so that they fit in with the writers' other commitments.

Discussion: The intent here is to emphasise the similarities and differences in the configuration of 'teaching staff' between conventional and distance programmes.

Seek examples from both your own and your participants' experience.

These issues are discussed in greater detail in Managing Staffing and Training, Topic 8 of this kit.

4.3 Monitoring and supporting staff at a distance

The management of open and distance learning programmes will almost always involve monitoring and supporting staff who are at a distance from central office. These staff may include regional centre staff, tutors, and learning materials producers such as writers of print materials and scripts for media production.

It has become somewhat of a truism in open and distance learning that learners in open and distance learning programmes need continuing contact with the programme and support from programme personnel as they undertake and work through their studies.

Staff at a distance need the same kind of support and contact, especially since they are frequently working under conditions such as the following:

- they tend to be part-time, with major affiliation and commitment to some other institution;
- they tend to be on short-term or annual contracts;
- they likely have no regular face-to-face contact with supervisors and colleagues; and
- their roles are frequently diffuse and ill-defined.

Too often the adage, 'Out of sight, out of mind', means not just isolation but invisibility for distant staff when it comes to decisions on policies and procedures, which tend to be made without due attention to their particular circumstances and needs.

Because of the distance factor, it is even more important with distant staff to practise effective staff relations, by means of:

- clear role descriptions, expectations, and reporting lines;
- a thorough induction into the programme, its history, goals, policies, and procedures;
- continual updating on changes in policies and procedures;
- frequent and effective two-way communication (e-mail is an excellent medium for this where available);
- opportunities for face-to-face meetings;
- frequent performance monitoring and review;
- accurate and efficient records systems; and
- opportunities for input into decisions that affect their work.

5. Teamwork

5.1 Managing project teams

Much of the work of open and distance learning is carried out in teams.

Example: The development and production of a course requires the collaboration of subject matter experts, instructional designers, editors, visual designers, and a variety of support people, including liaison librarians, printers, and so on.

Likewise, the delivery of a course requires the collaboration of tutors, counsellors, librarians, registry personnel, and course materials warehousing and dispatch clerks, among others.

Managing a team places different kinds of demands on managers than does line management:

- time, because you have specified start and finish dates;
- resources, because you need a high degree of financial accountability as projects are more difficult to cost and control than are routine line management functions; and
- personnel, because you tend to work with a cross-functional team of temporary members, some of whom will be in a reporting line to someone other than you.

Effective teamwork depends on a number of variables.

Time

A good deal of time is required to establish and re-establish the common ground that is essential to effective teamwork, which is achieved through shared experience, reflection, and discussion.

Experience and maturity

Experience in team-building among at least some of the team members is a great asset, as is a mature approach to the challenges of interpersonal communication.

Knowledge

Team members ideally should possess knowledge and expertise in a variety of fields that complement and reinforce each other rather than conflict, and that when taken together yield a much more complete and rounded picture than one field alone could produce.

Skills

Each team member needs to have skills he or she can put to direct use in making the team effective. Communication skills in particular include:

- explaining;
- describing;
- categorising;
- articulating;
- listening;
- checking out assumptions;
- attending to feelings;

- facilitating discussion; and
- demonstrating.

A sense of humour is also a valuable asset.

Shared respect

Each team member ideally should respect and admire the competence of the other members and the knowledge and skills of their respective fields or subfields. This respect extends to an eagerness to learn about the others' fields and to use all contributions.

Openness and flexibility

Vital to teamwork, openness and flexibility have several facets:

- making and accepting offers; saying 'Yes, and' more often than 'Yes, but' or 'no';
- accepting and even welcoming differences and recognising that diversity is strength;
- demonstrating tolerance, raising biases to conscious levels, controlling them, and expressing tolerance out loud;
- sharing rather than trading ideas, experiences, and skills;
- building on each others' learning and ideas to develop something new; and
- being willing to take risks, make errors, and learn from them as natural and useful parts of teamwork.

Desire to learn, curiosity

This variable stretches all the way from simple curiosity about how others might need to adapt our ideas in order to use them to viewing differences as exciting.

Commitment to process

All team members are concerned with efficiency and getting the job done and all get frustrated by the time taken up in meetings. Nonetheless, process is part of the task, and coming to grudging agreements rather than griping ones is vital.

Support and encouragement

Teamwork is exciting and difficult, and support and encouragement are needed in good times and bad, and should be expressed out loud and often.

Sensitivity

Sensitivity emerges in two ways: putting others' needs before one's own, at least some of the time, and paying attention to the emotional content of looks, words, and silences as well as to their intellectual substance.

Trust

Trust emerges as the keystone of teamwork. Without it teams fall apart. Risk is the flip side of trust, and must be accepted as part of the bargain.

Attention to the use of power

No matter how right or good our ideas are, telling others what to do is not the approach of a successful team, or between the team and others with whom the team interacts.

Determination and energy

Determination shines through in resistance to fatigue (headache, what headache?), in the insistence on recapturing focus when group discussion wanders too far off track, and in the continual juggling of tasks and time and other commitments in order to accommodate the needs of the group.

Discussion: Ask participants for examples from their experience of teams that worked and of teams that did not work.

5.2 Networking

Creating, expanding, and maintaining relationships with other agencies — popularly known as *networking* — is an important part of the manager's job in an open and distance learning context. As was discussed in Issues in Open and Distance Learning, Topic 2 of this kit, collaboration among educational institutions, agencies, and programmes is becoming increasingly the order of the day, both in industrialised and less affluent countries, for a number of reasons, among them:

- public funding for education at all levels is decreasing, and governments are requiring institutions to work with each other and in many cases with industry in order to qualify for funding; and
- institutions and agencies are responding to decreasing levels of funding by seeking collaborative arrangements that can make scarce resources go further.

Open and distance learning programmes are far from the only ones affected by these pressures. Nonetheless, open and distance learning programmes are among the foremost seekers and implementers of collaborative arrangements, because of the nature of their work and for various other reasons:

- Learning materials development represents a major cost to distance programmes. Producers of such materials can share costs through co-development arrangements, or recoup costs by sales and leases of materials. Low-resource programmes can save on staffing and other recurrent costs by purchasing materials rather than developing their own.
- Learners are seeking flexibility, especially the ability to apply credits taken in one programme to the completion of requirements for another. Credit transfer arrangements place great demands on institutional collaborative arrangements.

- The technologies used in delivering distance programmes are forcing collaboration, partly because delivery agencies need to share costs, and partly because of the nature of the technologies themselves, which increasingly make distinctions between ‘distance’ and ‘conventional’ programmes irrelevant and meaningless.

Advantages of regional networks

A particular instance of networking in open and distance learning is the network of ‘access centres’ or ‘learning centres’ that many programmes maintain in order to provide localised delivery of learning materials and support to learners. Such networks often include facilities provided by other agencies and institutions, including classrooms for tutorial sessions, library and study space, and co-operating staff. As an example, see the case study for the Open Access College in this kit.

Regional networks:

- they provide localised, personalised service to learners;
- they strengthen the local identity of the programme or institution;
- they can be an important marketing tool;
- they can reduce turnaround time in the return of feedback to learners on assignments;
- they can provide enhanced support to learners, via laboratories, library resources, computing facilities, and audio and video conferencing;
- they provide sites for regular meetings and tutorials; and
- they provide the programme with direct feedback on its performance.

For managers, such networks raise issues about how much responsibility and control of which sets of tasks and functions should be delegated or decentralised to these regional centres. Clarity on these issues is critical to the effective management of a regionalised system.

For managers of open and distance learning programmes, increased collaboration means a need for the following kinds of skills and knowledge:

- a heightened awareness of and sensitivity to differences in institutional cultures;
- skills in building effective trust relationships; and
- the ability to define, perceive, and monitor mutual benefits in collaborative arrangements.

In many ways these are skills similar to the skills team members need. Thus managers of open and distance learning programmes need skills not only in managing teams but also in being part of them on a wider scale.

Ross Paul in his book, *Open Learning and Open Management* (1990) gives the following advice to programme managers who are involved in collaborative projects:

- ensure that clear benefits from the collaboration are established and understood by all partners;
- ensure that clear and specific objectives and measures of achievement are stated;
- remain open to re-negotiation if necessary;
- keep the number of partners involved to the fewest possible to make the collaborative venture successful;
- delegate clear authority and responsibility to specific partners and individuals;
- take seriously the need to understand differences in corporate cultures;
- scrutinise the collaborative venture on a regular basis and disband if it is no longer meeting its objectives; and
- ensure that agreements have the full support of the executive officers of all the partner institutions.

Collaboration is dealt with in greater detail in Issues in Open and Distance Learning, Topic 2 of this kit.

6. Quality assurance

6.1 Quality assurance as a management system

Quality assurance is an approach to organising work that ensures that:

- the institution's mission and aims are clear and known to all;
- the systems through which work will be done are well thought out, foolproof, and communicated to everyone;
- it is clear to everyone who is responsible for what;
- what the institution regards as 'quality' is well defined and documented;
- systems are in place to check that everything is working to plan; and
- when things go wrong — and they will — there are agreed ways of putting them right.

Essential features of quality assurance

The quality assurance approach to management has three essential features:

- a method of checking up on how well the system is being adhered to;
- a method of correcting mistakes; and
- a method of changing the system if it has become out of date.

Quality assurance starts with a clear statement of what the institution exists to achieve or, in other words, its mission. For example, the mission might be:

- to be the best provider of open and distance learning in the region or country;
- to provide access and courses to the most disadvantaged learners; or

- to achieve excellence in research in open and distance learning.

Once the mission statement is agreed, the quality assurance system compels the institution to agree the methods by which things are to be done.

A key part of setting up a quality system is defining a quality policy. This policy document has to be in a form that all staff can use and understand. It might cover:

- who is responsible for setting up and running the quality assurance system;
- how management is to monitor and review the system;
- which functions or tasks will have written, defined procedures;
- how the implementation of these procedures will be monitored; and
- how failure to adhere to the procedures will be corrected.

6.2 Evaluating programme performance

The three steps of evaluating can be labelled

- measuring;
- comparing; and
- correcting.

Each presents special problems in an open and distance learning programme.

Measuring

Measuring the learning activity of learners is complicated by distance.

Even determining such apparently straightforward indicators as rates of learner progress or drop-out is surprisingly difficult to do on a continuous basis, especially in programmes that enrol learners throughout the year.

Only in the vital areas of academic quality is measurement in a distance programme easier than in a conventional programme, for the team approach to course development and services delivery both encourages quality and ensures a wide awareness of any shortcomings.

It is rather ironic that, although the team approach gives distance courses more quality — and usually quantity — than their conventional counterparts, the notion that distance study is substandard dies hard in traditional circles.

Comparing

Comparing the performance of distance programmes with conventional programmes is also problematic.

In the area of economic performance, standards borrowed from conventional education should be used with caution.

Example: Capital-to-operating cost ratios tend to be considerably higher for conventional programmes than for

distance programmes (except in cases in which a distance programme has had to make a major investment in technological infrastructure).

In the area of learner performance, especially in terms of retention and graduation rates, comparing distance learners with conventional learners may be difficult given probable differences in entry qualifications and circumstances of study. Even comparing one distance programme with another is difficult, since different programmes tend to adopt different definitions of who counts as a 'learner'.

Example: Some programmes count as learners all those who have enrolled in a course, whereas others limit the use of the term to those who actually sit the exam, and discount the fact that only a small percentage of those initially registered have actually stayed with the course long enough to write the exam.

Correcting

Because the standards of conventional programmes may often not be appropriate to open and distance learning programmes, the proper response to a gap between the measure and the standard may be to revise the standard rather than to initiate corrective action.

If corrective action is required, however, the highly integrated and complex nature of an open and distance learning programme may make implementation somewhat problematic.

In addition, although open and distance learning programmes tend — and need — to be flexible so that they can respond effectively to learners' needs and circumstances, this flexibility should not be abused. Staff and learners do not appreciate being part of a continuing experiment in which all the variables are undergoing constant modification.

Finally, the cost implications of corrective action may be more far-reaching in an integrated system of the kind that tends to characterise open and distance learning programmes.

Example: The introduction of a new technology for delivering the teaching component of the programme, even if it is confined to one course in the programme, will have consequences for all aspects of the programme, from recruiting and marketing to staffing and training to developing, producing, and dispatching materials.

These issues of evaluation are dealt with in greater detail in Research and Evaluation, Topic 10 of this kit. Issues of budgeting and costing are dealt with in greater detail in Financial Management, Topic 5 of this kit, and in issues of Quality Assurance in Performance Indicators, Topic 9 of this kit.

7. Practice exercise

7.1 Putting management issues in context

Instructions: Divide the group into a number of small working groups, four if possible.

Assign to each group one of the issues discussed in this section:

- analysing systems (systems thinking);
- staffing;
- teamwork; and
- quality assurance.

Ask each group to discuss and document the following three things:

- examples of the ways in which this set of issues emerges in the programmes in which the group members are involved;
- the ways in which their programmes are dealing with these issues; and
- the level of satisfaction with these responses, and the kinds of problems for which solutions are still being sought.

Ask each group to present their findings to the larger group, for discussion.

Timeframe: Approximately one-and-a-half hours, one half hour for small group discussions, ten minutes for each group report, and twenty minutes for general group discussion.

Materials required: Flipchart paper or overhead transparencies for the reports back to the plenary group.

TOPIC 5

Financial Management

Overview

Source materials for this topic

Organising and implementing budgets

Models of budgetary management

The role of a finance department

Roles of operating divisions

Accountability

Revenue sources

Government funding

Tuition fees

Ancillary operations

Other revenue

Capital funding

Budgeting

The budgeting process

Steps in preparing a budget

Budgets for decision making

Performance measurement

Costing open and distance learning programmes

Terminology

Concepts of cost analysis

Activity costing and overheads

Process and project costing

Process costing

Project costing

Some examples of using costs in decision making

Cost-effectiveness

Opportunity costs

Cost–benefit analysis

Cost control techniques

Practice exercise

The cost of open and distance learning

1. Overview

These materials support a discussion on the topic of costing and preparing budgets for open and distance learning programmes. The terms, concepts, and processes are presented as much as possible in a generic open and distance learning context. You may wish to apply them as well to some real situation drawn from the participants' context.

1.1 Source materials for this topic

Dhanarajan, G., P. Ip, K. Yuen, and C. Swales (eds.). *Economics of distance education: recent experience*. Hong Kong: Open Learning Institute, 1994.

Orivel, F. *Analyzing costs in distance education: a methodological approach*. Dijon: IREDU, Université de Bourgogne, 1987.

Perraton, H. *The cost of distance education*. Cambridge: International Extension College, 1982.

Rumble, G. *Costing distance education*. London: Commonwealth Secretariat, London, 1986.

Rumble, G. *The Costs and Economics of Open and Distance Learning*. London: Kogan Page, 1997.

2. Organising and implementing budgets

2.1 Models of budgetary management

An organisation may follow two models in handling budgets and costs: the centralised model and the decentralised or participative model.

Centralised model

In the centralised model:

- budgets are developed centrally and all analyses are carried out at a central location;
- the finance department typically controls the entire process, with minimal involvement of the academic or other operating divisions; and
- the finance department also produces all management information for the organisation.

Decentralised or participative model

In the decentralised or participative model:

- all operating units participate fully in developing the budget;

- those responsible for the operations of a particular area perform detailed analyses of variances; and
- the finance department is considered a support service, co-ordinating the collection of budget information and producing the overall institutional budget.

The participative model offers the following advantages:

- stronger motivation of operating managers to accept responsibility for their expenditures;
- a feeling of ownership because of being involved in the process;
- greater knowledge of needs because of direct involvement with learners; and
- better accountability at the level of the cost centre.

This model may not apply, however, to small organisations or to small units within a larger organisation that are considered operating units of that organisation and thereby subject to central finance policies and procedures.

2.2 The role of a finance department

For organisations to which a participative model applies, the finance department has the following roles:

- co-ordinates the collection of budget information;
- produces the overall institutional budget;
- prepares reports;
- supplies detail used by operating and academic personnel to measure their performance;
- provides assistance to managers in analysing the information;
- maintains the historical accounting records;
- arranges for receipt and disbursement of cash;
- makes short-term investments;
- develops and maintains financial information systems;
- prepares cost–benefit analyses; and
- arranges short- or long-term financing.

2.3 Roles of operating divisions

Academic personnel

Since academic personnel have first-hand knowledge of the educational requirements of their learners, they are in the best position to know how available resources should be distributed. They take hard financial data and use it to construct an operating plan that comes closest to fulfilling their vision.

Negotiating

Available financial resources are seldom adequate to meet everyone's needs. Therefore all managers must be skilled negotiators in order to obtain their fair share.

Variations

Once the hard decisions have been made, operating divisions must measure their financial performance by analysing their actual expenses compared to their original plan determining why there is a difference, or variance, between planned and actual expenditures and take corrective action.

2.4 Accountability

A definition of *accountability* might be that operating personnel are instrumental in developing operating budgets and therefore are responsible for the actual costs that they have estimated in their budgets. This involves:

- taking great care in preparing budgets; and
- monitoring their expenditures.

Delegation of authority must go hand in hand with accountability.

Note that in many open and distance learning programmes there is only limited decentralisation, since control over salaries, usually the largest budget item, remains centralised. Many managers control only non-salary expenditure.

3. Revenue sources

Various revenue sources may provide the financial resources for an open and distance learning institution, and therefore a variety of agencies to whom institutions may be accountable.

3.1 Government funding

Many governments fund education on an enrolment-driven formula. Given its unique cost structure, with few if any classrooms and higher course development costs, and typically part-time learners, open and distance learning may not fit easily into formulae designed for conventional institutions.

3.2 Tuition fees

Determining a reasonable tuition fee can be a difficult task and may involve several, sometimes incompatible, factors, including:

- government policy;
- revenue needs (for example, need to recover full costs);
- market elasticity (how much enrolments are affected by the price of the course);
- mission of the institution or programme; and
- comparison with other programmes.

3.3 Ancillary operations

Open and distance learning programmes can generate substantial revenue from activities outside normal course delivery. Examples include:

- textbook sales;
- course material sales;
- consulting fees; and
- charging out facilities, for example, printing.

3.4 Other revenue

Likely the other most important type of revenue is interest earned on investments. Donations and endowment funds also fit here.

3.5 Capital funding

For an educational programme to maintain and improve its services, capital funding is required. Unless the hosting organisation has the power to finance its own capital programme, it usually depends on either government or fund raising, neither of which is an assured funding source.

4. Budgeting

4.1 The budgeting process

The budgeting process consists of a series of steps by which estimates of revenue and expenses and related statistical data are used to compile a plan for expenditure for the next financial period.

Probably the most important in differentiating budgets for open and distance learning programmes from budgets for conventional programmes is the higher proportion of fixed expenses for course development and revision:

- course development costs are not dependent on enrolments; and
- if a full curriculum is to be offered, courses must be developed and kept current, regardless of the numbers of learners in the courses.

4.2 Steps in preparing a budget

The preparation of an open and distance learning programme budget involves the following steps, some of which may occur simultaneously, and some of which, in a small operation, may look somewhat different:

- Review the strategic plan and adjust if the expected funding levels cannot accommodate it.
- Obtain data on forecast enrolments, inflation rates, salary increases, required course development and revision, unit-tuition fees, historical unit costs per enrolment, and so on.

- Prepare preliminary forecasts of revenues from all sources and assess the reliability of the estimates. It may be necessary to prepare budgets for the various funding levels.
- Determine preliminary allocations of forecast revenues to operating divisions, in order to develop initial funding parameters.
- Have the finance department prepare working papers and any other data that will assist operations personnel in estimating their expenditures.
- Develop expenditure estimates by cost centre and expense type, within the divisional parameters.
- Prepare estimates of monthly expenditures and revenues, an important step in order to reduce variances due to simple timing differences, and to serve as a basis for forecasting cash requirements.
- Compile the cost centre budgets into divisional and then institutional expenditures.
- Conduct final review and incorporate any necessary re-allocations.
- Obtain final approval from the governing body.
- Load the approved budget into the financial information system for subsequent comparison with actual revenues and expenses.
- Develop the management reports to be used for cost control and decision making.
- Set up procedures for monthly comparison of the actual expenditures and revenues with the plan (variance analysis) and the reporting of differences.

4.3 Budgets for decision making

Budgets can be used for at least two purposes:

- as control mechanisms for the operation of open and distance learning units; and
- to assess different courses of action and serve as a basis for decision making.

Different courses of action are assessed in an exercise called a *cost–benefit analysis* before the unit budget is developed. A *cost–benefit analysis* is carried out as follows:

- if a service can be delivered in two or more possible ways, then the costs of each are estimated and the relative benefits are identified;
- referring to the available revenues, informed decisions are made and the best value for a given expenditure determined; and
- decisions are made so that they attain the objectives of the open and distance learning institution or unit.

Some examples of budgeting decisions that can be made using cost–benefit analysis include whether or not to:

- provide face-to-face instruction as well as correspondence;
- use television or other electronic assistance;

- provide various types of media in a given course;
- introduce new technology;
- purchase capital equipment;
- develop computer systems;
- limit tutor course loads;
- invite off-shore enrolments;
- develop a course in circumstances of limited funding;
- develop new programmes;
- develop new ancillary activities; and
- increase personnel to enhance service or management information.

4.4 Performance measurement

Close adherence to a budget can show careful initial planning and prudent use of resources.

If expenses are greater than budget, however, this does not automatically indicate poor management. Overspending in one or more areas may be necessary to maintain service.

Nevertheless, because of its impact on overall finances, significant overspending must be carefully weighed and approved beforehand.

The budget and actual variances are indications of a manager's ability to plan his or her expenditures and adhere to the operating plan.

Good managers use budgets as financial guidelines.

5. Costing open and distance learning programmes

5.1 Terminology

- The *cost* of something is the amount of actual or notional expenditure of money incurred on, or attributed to, a specific object or activity.
- The *total cost* is the sum of all the costs attributed to something. Most open and distance learning institutions produce a product (learning materials, graduates) or a service (tutorial, counselling sessions) against which costs can be assigned.
- A *cost unit* is a measured amount of a product or service used for the expression of the costs of that product or service.
- *Cost centres* are locations, functions, items of equipment, or departments to which costs are attributed. For example, a particular degree programme may be identified as a cost centre within an institution.
- The *period of account* is the period of time over which costs are measured.
- Normally, costs are measured over a year — the *financial year* — which may or may not coincide with the academic or calendar year.

- *Recurrent costs* are costs that occur year after year (or period of account after period of account).
- Costs that do not occur year after year are called *one-time* or *non-recurrent costs*. The distinction is important because it is easier to withdraw from spending on non-recurrent items (e.g., an equipment purchase) than from recurrent items (e.g., staff salaries).
- *Revenue cost* is expenditure that is expected to benefit only the current period of account. Since it is related to the current operations of the enterprise, it is also referred to as an *operating cost*.
- *Capital cost* is expenditure on the acquisition of fixed assets (land, buildings, machinery, equipment) where the expenditure is intended to benefit more than one accounting period.
- A *capital ex revenue budget* is money set aside on a recurring basis to meet capital expenditure.

5.2 Concepts of cost analysis

- *Costs* are the units that measure the efficiency of any organisation.
- *Direct costs* are costs that can be identified with a particular product or service and not with others. These normally comprise the cost of materials, labour, and of expenses directly incurred on the product or service.
- An *indirect cost* is a cost which cannot be identified with any particular product or service, but has to be shared over a number of products or services because it is common to or jointly incurred by them.
- The *overhead cost* is the sum of all the indirect costs of a cost centre or cost unit. Examples could include the cost of a shared telephone exchange, central computer, and utilities.
- Fractions of the cost of a shared facility can be *apportioned* to cost centres.
- *Fixed costs* are operating costs which are unaffected by variations in volumes of output. This does not mean that they do not vary over time in response to other cost factors (for example, price rises).
- *Variable costs* are costs that vary with volume of output.
- The *marginal cost* is the additional cost of an increase of one unit of output (for example, one additional open and distance learning centre). This term is often — but wrongly — used to describe the additional cost arising from an increase in more than one unit of output. The additional cost of more than one unit of cost (for example, ten open and distance learning centres) is more correctly called the *incremental cost* for that increase in activity.
- Some fixed costs are only fixed within a certain range of activities, called the *relevant range*.
- A *stepped fixed cost* is a cost that varies with the level of activity, but only has a number of possible values, each of which applies over a relevant range.

5.3 Activity costing and overheads

What we do with overhead costs depends largely on why we are costing. In particular, what we do will depend on whether:

- we need to know the full cost of an activity. If so we will need to consider the direct costs but also the overhead costs and the extent to which overheads should be attributed to the product or activity; and
- we are concerned only with marginal or incremental costing, that is, whether we are trying to assess the impact on total costs of changes in the volume of output. This involves identifying the direct costs of the variable we are interested in plus any stepped fixed costs that are affected by that variable.

Full absorption costing is used for some purposes — for example, to support pricing decisions and to derive performance measures — but is not required for others, as when we are looking at the effect of changes in the volume of output. Ask yourself, ‘Am I looking at costs as they are now (full absorption costing) or am I seeking to examine the effect on costs of profitability of a change in volume costs (marginal costing)?’

In an *activity costing exercise*,

- the first thing to establish is the segment or cost object which is the subject of the exercise;
- the second point is to establish the focus of the inquiry: direct cost only or full cost?

Exactly how overheads are apportioned depends on judgements about the nature of the overheads and what factors drive them. Quite often there are two stages in the process:

- general overheads are apportioned between production and service delivery departments; and
- overheads are then absorbed into or allocated between the cost objects.

Absorption and apportionment rest, more than most things, on judgement (sometimes called juggling).

6. Process and project costing

Costing can be determined in different ways for differing purposes. Two examples follow.

6.1 Process costing

Process costing as applied to manufacturing is a system by which expenditures are accumulated into costs of production and allocated to units of the product, hence unit costs.

Process costing is not strictly applicable to open and distance learning delivery, which is a service rather than a product. However, the same principles can be used. You can determine unit costs for delivery on a similar basis and use them for similar purposes:

- measuring against standards;
- determining revenue needs;
- developing budgets; and
- deciding on various courses of action.

6.2 Project costing

Project costing is used when the manufacturing process is not continuous, but is a series of large, special-order contracts.

An example in open and distance learning is the development of a course. This activity has

- a definite start date;
- a unique identity;
- a scheduled completion date;
- a budget;
- costs accumulated so they can be compared to the budget and maintained as a historical record;
- direct costs charged to the project; and
- overhead applied as a proportionate share of indirect expenses.

Course development costs are not normally written off over the life of the course but are charged to the period they are incurred. Nonetheless it is important to measure performance against budgets and keep records of development costs for specific courses. Historical costs of course development are indicators of the courses that will provide the most benefit for the available resources, if no other course priorities apply.

7. Some examples of using costs in decision making

7.1 Cost-effectiveness

Some of the benefits of a project may be tangible and real, including

- increased efficiency;
- error reduction;
- increased learner contact time; and
- reduced recruitment costs.

Others may be intangible, such as

- higher morale;

- greater loyalty; and
- heightened staff commitment.

In addition, it is not always easy to decide who reaps the benefit of carrying out a project such as this. Is it the institution, the staff, the distance learners, the community, or even the nation? If senior management agrees on these objectives, then all these aspects might be considered valid.

7.2 Opportunity costs

Opportunity costs are the notional costs, difficult to quantify, of undertaking one activity rather than another. For example, the project team and other staff involved, as well as materials and equipment, could all have been used in different ways to benefit the institution during the project period:

- the space and buildings could be used instead for direct classroom purposes;
- the team members and managers supporting administration could be used in tutoring; and
- the equipment and materials could be transferred to study areas or learning centres.

The opportunity costs of all these resources is the return that could have been achieved by using them for teaching output.

However, opportunity costs are generally omitted from costing exercises because of the subjective judgement involved in quantifying them. They are useful when you are comparing two alternative projects.

7.3 Cost–benefit analysis

Cost–benefit analysis is a systematic comparison between the cost of carrying out the project, and the value of the resulting service, resource, information, or product to any of a possible range of beneficiaries.

Cost–benefit analysis involves trying to determine whether the return expected from the project investment is high enough to match the criteria laid down by management.

Cost–benefit analysis also allows a stricter basis for the definitions of the project objectives and gives senior management a clearer view of the effectiveness of the project.

Some criteria for determining whether an investment is worthwhile or not include:

- *pay-back period of return*: how long will it take to pay back the original investment of staff salaries and other costs?
- *rate of return*: what percentage return are we getting on the investment?
- *discounted cash flow*: what return would we want at some time in the future for a payment we make now?

Financial considerations can help to improve decision making about projects but these decisions are not the only ones since other values include social benefits or human

relations values. A typical dilemma in open and distance learning programmes exemplifies this.

Example: The larger the number of open and distance learners the programme enrolls, the greater the fee revenue generated for the programme. One way for a programme to generate a high rate of return on this revenue is by spending more on marketing and recruiting than on producing learning materials for these open and distance learners or providing them with support services, since high-quality materials and support services cost money to produce and supply. Over the long term, however, a programme operating in this way may not continue to attract learners or justify its existence to outside funders and donors, and hence be ill-served by such a strategy.

8. Cost control techniques

A number of strategies other than variance analysis can be invaluable in controlling costs. Here are a number of suggestions.

- *Cash handling:* Ensure that all remittances are deposited in your bank account as soon as they are received so they can earn interest.
- *Accounts receivable:* Ensure that your accounts receivable are as current as possible, again so receipts can earn interest in your account.
- *Inventory:* Keep inventory levels as low as possible, consistent with maintaining stock on hand to service learners. Cash tied up in surplus inventory is not earning interest.
- *Accounts payable:* Ensure that you take full advantage of commercial credit terms. You will also gain considerably by not paying until the due date.
- *Short-term investments:* Develop a cash-management system that will identify cash temporarily surplus to requirements and invest it in short-term funds.
- *Contract work:* Try to negotiate as much of the payment as possible in advance; on big contracts, arrange for periodic progress payments.
- *Tendering:* To benefit from competition, all major purchases should be by way of tender.
- *Review and control programmes:* Keep a close eye on costs such as photocopying and telephone, both of which are significant and controllable.

9. Practice exercises

9.1 The cost of open and distance learning

Instructions: Divide the group into a number of small working groups, three if possible.

Assign to each group one of the following scenarios. Ask each group to discuss and document their answers so they can present their findings to the larger group for discussion:

- *Scenario 1:* GLAD (Global Learning at a Distance) is a commercial distance teaching company. It has just expanded its operations by launching a Diploma in International Law. It has hired permanent academic and administrative staff to support the programme, and has bought a building in the suburbs of the capital city. Furniture and equipment have also been purchased, and subscriptions for various law journals have been taken out. (Back issues of journals and important textbooks have also been bought.) The first task for the academic staff has been the development of a series of first year courses, which will have an expected life of several years. The main medium of teaching is print, and expenditure has been incurred on copyright clearances, design, editing, and print production, as well as hiring academic consultants to write certain units. Editing, design, and printing are all undertaken by an external publishing house under contract.

What kind of expenditure are the following?

- salary and associated costs of the permanent academic staff;
 - cost of the building;
 - cost of the furniture and equipment;
 - journal subscriptions; and
 - cost of producing the first year courses.
- *Scenario 2:* GLAD has decided to offer a new course. For this course, the cost of materials, postage, and script marking per learner is \$56. In addition to correspondence tuition, GLAD insists that learners attend a day school. The learners are divided into classes of about 25, each with a tutor. The cost of the tutor for the day is \$80. The cost of classroom hire works out at \$24 per room per day. In addition to these costs, the learners come together and are shown a film. The cost of putting on the film in an auditorium with a capacity of 440 seats is \$70 (auditorium hire plus technician). Each week over the 10-week course, two radio programmes are broadcast at a cost of \$32 per programme. There are at present 284 learners on the course. Demand is likely to fluctuate, but in practice is unlikely ever to exceed 350 learners.
 - What kind of cost is the cost of postage?
 - What kind of cost is the cost of the face-to-face tutor and classroom?
 - What kind of cost is the cost of the film show?
 - What kind of cost is the cost of transmitting the radio programmes?
 - Where appropriate, what is the relevant range of these costs?
 - What is the marginal cost per learner?
 - What is the incremental cost of increasing the number of learners by 27?

- *Scenario 3:* At GLAD, three courses in financial management are offered: Cost Accounting, Budgeting, and Activity Costing. The way these courses are taught varies, so that the direct costs per learner are quite different. Also, the number of learners on each course is different. Management has received a report on the direct costs of these courses, as follows.

The report goes on to say that the department of Accounting and Financial Management has overhead costs of \$25,000. The Chairman of GLAD's Finance Committee then asks what the full cost per learner is, so that fees can be set. At the next meeting, the Director of Finance presents a paper which apportions the overheads in proportion to the number of learners on each course. The Chairman looks surprised. He did the calculations another way. He divided the overhead cost of \$25,000 equally across all three courses. This makes a real difference to the cost per learner on each course, and hence to the fee, if fees have to cover full costs.

- Work out for yourself the cost per learner in the Budgeting course. (Hint: in each case, take the full cost per course, and divide by the number of learners; for example, the Director's full cost per learner on the Cost accounting course is $\$16,905/100$ learners.)
- What is the Director's answer?
- What is the Chairman's answer?
- Which is right?

Timeframe: Approximately one-and-a-half hours, one half hour for small group discussions, ten minutes for each group report, and twenty minutes for general group discussion.

Materials: None. Formal reporting back from small groups is not required; facilitator can guide discussion by asking groups to supply answers from their discussions.

TOPIC 6

Learning Materials

Overview

Source materials for this topic

Choosing an institutional strategy

Choosing appropriate technologies

Technologies used in open and distance learning

General points about technology in learning

Managing course planning and development

Pre-budgeting and approval for course development

Contracting development personnel

Copyright

Scheduling course development

Managing course production and delivery

Terminology

The process

Managing materials distribution

Technological innovations

Practice exercise

Issues in development and production

1. Overview

These materials support a discussion on the topic of planning, designing, producing, and delivering learning materials. The emphasis in these materials is on print materials, since print continues to be a major component of most open and distance learning programmes. This emphasis may or may not be appropriate for your participants. For management of other media, you may wish to draw on the resources available in another COL kit, *Integrating Media*.

1.1 Sources materials for this topic

Bates, T. *Technology in open learning and distance education: a guide for decision makers*. Vancouver: The Commonwealth of Learning and the Open Learning Agency, 1991.

Jenkins, J. *Course development: a manual for editors of distance teaching materials*. 2nd ed. Cambridge: International Extension College, 1987.

Parer, M. (ed). *Development, design and distance education*. Churchill, Australia: Centre for Distance Learning, Gippsland Institute, 1989.

Rowntree, D. *Preparing materials for open, distance and flexible learning: an action guide for teachers and trainers*. London: Kogan Page, 1994.

2. Choosing an institutional strategy

There are basically three strategies for providing course materials in open and distance learning programmes:

- adopt existing materials;
- adapt existing materials; and
- create materials from scratch.

These strategies are set out in the tables on the following pages, together with the benefits they offer, their limitations, and other factors that might affect decision-making. In reality, these strategies form a continuum, with adoption at one end, creation at the other, and adaptation somewhere in the middle. For example, most courses that are created from the ‘ground up’ make use of some existing materials, such as textbooks or videotapes. In addition, almost all courses that are ‘adopted’ undergo some degree of adaptation.

Adoption Strategies for Providing Course Materials in Distance Education

Strategy	Benefits	Challenges	Other factors
adopting existing materials	<ul style="list-style-type: none"> • may be less costly • less time consuming • can provide model • no need to pre-test • errors already eliminated • labour saving, less stressful for staff • reduces lead-in time • source of new 	<ul style="list-style-type: none"> • may not be relevant to needs • may not be suitable culturally, contextually • testing for fit may be needed • may kill creativity at local level • deprives local staff of ownership • may omit crucial content areas • may go out of print while you 	<ul style="list-style-type: none"> • status and prestige • ‘not invented here’ syndrome • cost to purchase or lease compared with ‘ground-up’ production

	<ul style="list-style-type: none"> ideas opportunities for collaboration can provide a quality not otherwise possible. 	<ul style="list-style-type: none"> still need copies may have hidden costs, e.g., support structure may promote dependency may push planners into premature start
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Adaptation Strategies for Providing Course Materials in Distance Education

Strategy	Benefits	Challenges	Other factors
adapting existing materials	<ul style="list-style-type: none"> gives a headstart, reduces lead time gives models and ideas may be easy to convert can select from available materials cost-saving can improve by adding components can increase appropriateness can up-date can improve writers' skills without having to produce whole course 	<ul style="list-style-type: none"> expert knowledge still needed may reduce quality by altering may be self-defeating in terms of costs and time does less for developing local capacity may not assist in developing coherent programme levels may not match 	<ul style="list-style-type: none"> accreditation issues control and ownership of course issues of copyright credibility of provider

Creation Strategies for Providing Course Materials in Distance Education

Strategy	Benefits	Challenges	Other factors
creating original materials	<ul style="list-style-type: none"> likely to fit target audience more closely more likely to be culturally relevant will be up-to-date will be original will build local capacity and self-confidence will be easier to modify if necessary 	<ul style="list-style-type: none"> is the most expensive option lead-in time is longer may put high stress on developers amount of work may be underestimated needs trained and skilled staff need to build up capacity and expertise need to persuade people it's worth doing needs adequate resourcing 	<ul style="list-style-type: none"> start-up costs status of enterprise, political agenda

3. Choosing appropriate technologies

3.1 Technologies used in open and distance learning

The number of new technologies introduced into distance education and open learning over the last ten years or so has expanded rapidly. Here is a classification of these media based on whether they offer one-way or two-way communication.

Media Categorised as One-Way or Two-Way Communication

	Audio	Radio	Video	Television	Computers
One-way	Cassettes	Educational radio	Cassettes	Educational television	Games
	Audiovision	Interactive radio	Clubs		Computer-assisted learning
					Web based instruction

					Databases
					Bulletin boards
Two-way	Telephone tutoring	Two-way instructional radio		Video conference	Computer conference
	Audio conference			Interactive television	Computer-mediated communication
	Audio-graphics				

A model for choosing appropriate technologies and media

The salient factors to be considered when deciding on the use of technology for teaching can be summarised in the simple acronym ACTIONS (Bates 1991):

The ACTIONS Model for Selecting Media

A	Access	Where will learners learn — at home, at work, at local centres? ‘A’ also stands for ‘availability’ and ‘affordability’.
C	Costs	What are the capital and recurrent costs? Which costs are fixed and variable?
T	Teaching functions	What are the presentational requirements of the subject? What teaching and learning approaches are required?
I	Interaction and user-friendliness	Do learners and teachers require a great deal of training to use this technology?
O	Organisation	What changes in organisation will be required to facilitate the use of a particular technology?
N	Novelty	To what extent will the ‘trendiness’ of this technology stimulate funding and innovation? To what extent will use of this technology enhance learner interest and motivation?
S	Speed	How quickly and easily can material be updated and changed? How quickly can new courses be produced using this technology?

Access

Factors to be considered when evaluating access include the following.

- Who is the target group? Who are the priority target groups to be served?
 - learners denied access to conventional institutions?
 - disadvantaged or equity groups?
 - the unemployed?
 - the working poor?
 - workers needing upgrading or further qualifications?
- What is the most appropriate location for this learning? For example,
 - at home?
 - in a local centre dedicated to open learning?
 - at a local public education institution that shares its facilities?
 - at work?
- Which technologies do learners have available to them?
- What proportion of potential learners have access to a particular technology?
- If you make the use of a particular technology optional for learners, is it worth using at all?

Costs

Some important distinctions to be made between and among the various technologies available in terms of their costs.

What are the capital costs?

Television and computing, for example, require high initial capital expenditure -- a computing network or mainframe, a television studio and equipment.

What are the recurrent costs?

Television, for example, also has high recurrent costs because of the production staff needed to operate the capital equipment.

What are the fixed production costs?

Fixed costs for producing one hour of teaching material have been estimated as follows:

- | | |
|---------------------------------------|--------------|
| • face-to-face lecture | 1 unit |
| • audio cassette/radio/teleconference | 2 units |
| • televised lecture | 2 to 5 units |
| • computer-mediated communication | 2 to 5 units |

- print 2 to 10 units
- high-quality television programme 20 to 50 units
- pre-programmed computer based learning 20 to 50 units
- computer-controlled video disc 50 to 100 units

Will there be large numbers of enrolments over which to spread any high fixed costs?

Can the materials be used for a number of years, thereby spreading the costs?

What are the variable costs?

For example, if audio cassettes are used, then the delivery costs vary in direct proportion to the number of students.

Technologies vary considerably in their fixed and variable costs:

- audio cassettes and radio have low fixed and low variable costs;
- face-to-face teaching, computer-mediated communication and tutor-mediated courses have low fixed costs but high variable costs;
- good quality broadcast television has high fixed costs and low variable costs; and
- pre-programmed computer-based learning and video discs have both high fixed and high variable costs, if work stations are to be provided.

Some of the newer interactive technologies such as computer conferencing and audiographics reduce fixed costs but have high variable costs, which make them suitable only for courses with relatively low student numbers.

Broadcast distribution is likely to be uneconomical for national distribution with less than 500 students per course for radio or less than 1,000 students per course for television.

Teaching functions

Media differ in the extent to which they can represent different kinds of knowledge. Most media can handle abstract knowledge, but some such as television are excellent for representing concrete knowledge. The representational possibilities of a medium like television are particularly important for non-academic learners, who often require concrete examples or demonstration rather than abstract theory. However, this form of television — which is symbolically very rich — is much more expensive to produce than televised lectures, which can be equalled symbolically by audio plus printed notes.

Media also differ in the extent to which they can help develop different skills. This is related to the control characteristics and the representational features of the medium. For example, computers are excellent for presenting and testing rule-based procedures, or areas of abstract knowledge in which answers are clearly correct.

Course designers, therefore, need a good understanding of what is required to teach a particular subject, and knowledge of the pedagogic strengths and weaknesses of the different media.

Interaction, user-friendliness, and control

Learners have much more control over permanent technologies such as books, cassettes, and computers than over ephemeral technologies such as lectures or broadcasts. This control enables learning from media to be much more effective.

Interactivity — the ability for the learner to respond in some way to the teaching material and obtain comment or feedback on the response — considerably increases learning effectiveness. There are two kinds of interactivity:

- *social interactivity*: learners' interaction with teachers and with each other via the medium; and
- *learning material interactivity*: learners' interaction with the medium; the level and the immediacy of feedback the medium itself provides; the extent to which the medium will accommodate the learners' own input and direction.

One-way media, such as print and broadcasting, require supplementing by two-way interaction with tutors, via:

- telephone;
- correspondence;
- computer communication; or
- face-to-face tutorials.

Computer-mediated communication provides:

- two-way communication at a distance;
- asynchronous contact, at the user's convenience;
- relatively low cost communication;
- potentially the means for freeing learners from the centralised control of pre-prepared and constricted curricula; but also
- high variable costs, because of the amount of time a tutor must spend on-line.

Organisational issues

The existing technological infrastructure within a country or an institution is a major factor in influencing media selection. For example, if an existing broadcast network is under-used, it is much easier to introduce television for open and distance learning purposes.

On the other hand, the need to exploit an existing technology can also be a very conservative influence on media choice.

Existing funding arrangements for course production are another important factor. For example, it is often difficult to shift funds from existing, 'traditional' technologies to newer technologies, because of the threat to existing budgets and power bases.

Innovation in this area depends essentially on 'champions for change' at a high level, such as that of vice-chancellor or dean. However, those in influential positions may sometimes champion a technology because it is new or 'leading edge' even though it may not be an appropriate choice for the programme in question.

Novelty

Caution is well-advised if the pressure to use new media comes from a desire for novelty or status. For example, audio cassettes combined with print can be a very low-cost and effective medium, but it is often easier to get funding for *new* uses of technology because they are more spectacular.

Novelty may be an important criterion in a highly competitive market, however. The fact that your programme looks 'leading edge' because it is using the latest in multimedia technology may make it more attractive to learners who have a choice between your programme and several others that use only one or two more 'traditional' media.

Speed

Open and distance learning programmes are plagued by the problem of time, specifically:

- the time it takes to produce a course; and
- the time a course must continue to be offered without changes once it is produced.

In some subject areas, such as public policy or information technology, courses need to be put on quickly and easily updated. Electronic publishing can enable relatively minor changes to be made, but the initial design process is still time consuming.

Some of the more interactive technologies such as audio conferencing and computer conferencing do allow for a quick development of a course and continuous updating.

3.2 General points about technology in learning

A number of generalisations can be made about using technologies in learning.

- *Media are flexible*: what can be achieved educationally through one medium can usually be achieved through any other medium given enough imagination, time, and resources.
- *Professional production and design are important*: each medium has its own aesthetic, and a different range of production skills necessary to exploit its unique features.
- *There is no 'super-medium'*: all technologies have their strengths and weaknesses.
- *Good teaching is important*: effective instructional design applies to the use of any medium for teaching.

- *Balance variety with economy*: the aim should be to use a limited range of media to maximise learning effectiveness, minimise cost, and a balance of both by convenience and ease of use to both learner and teacher.

Discussion: Ask participants to analyse the use of media and technology in their own situation. What factors, according to the ACTIONS model, have been influential in the selection decision? In addition, have on hand as many examples of the various technologies as are available to you, to share with participants.

4. Managing course planning and development

4.1 Pre-budgeting and approval for course development

The development of a course represents a major commitment of financial and human resources. Because of this, it is useful to ensure that the full extent of the commitment required is determined before the development project begins.

A typical procedure for this planning exercise is the development of a course planning document, sometimes called a *course blueprint*.

The course blueprint is circulated for comment to all units that are concerned with course production and delivery, including registration, tutorial services, academic departments, media and production, warehousing, and dispatch. The academic content may also be sent to other content experts, and to partner organisations and agencies, for review and comment.

Depending on the comments received, the blueprint authors may be asked to revise their proposal. Approval usually rests with someone in the organisation who has budgetary authority to commit the resources involved, such as the dean of a faculty.

Here is an outline for a typical course blueprint.

Course Blueprint Outline

A. Programme-related details

1. Course title
2. Programme
 - a. programme or programmes in which the course is intended as a component
 - b. compulsory or elective
3. Level
 - a. introductory or foundation
 - b. intermediate
 - c. advanced
 - d. postgraduate

4. Credit weighting
 - a. number of credit hours assigned to it
5. Semester
 - a. semester in which it is to be offered
6. Prerequisites
7. Anticipated annual enrolment
 - a. supporting data, including market survey, government statistics, experience from other programmes and courses.

B. Course package components

1. Course components to be produced in-house
 - a. study guide or guides
 - b. reader
 - c. learner handbook
 - d. assignment manual
 - e. media handbook
 - f. tutor manual
 - g. radio and television broadcasts
 - h. audio and video cassettes
 - i. computer software
2. Course components to be purchased or leased textbook or books, software, audio, video rights to broadcast a radio or video series
3. Entire course package

C. Development and production schedule

1. Development personnel involved
 - a. course team manager
 - b. course writer or writers
 - c. instructional designer
 - d. editor
 - e. illustrator or media producer
 - f. internal and external reviewers
2. Projected on-the-shelf date
3. Course development schedule, including all components and all media
4. Course production or reproduction schedule, including all components and all media

5. Anticipated course revision schedule

D. Content and pedagogy

1. Course aims
2. Course structure
 - a. block and unit titles
 - b. unit-by-unit objectives
 - c. readings
 - d. types of activities
 - e. role of audio, video, and television components
 - f. sample unit
3. Practical work
 - a. laboratories
 - b. teaching practice
 - c. fieldwork
4. Assessment scheme
 - a. assignments, including their number, timing, format, and markers (number, internal or contracted)
 - b. examination(s), including their number, timing, format, and markers (number, internal or contracted)
5. Evaluation scheme
 - a. developmental testing schedule
 - b. monitoring or formative evaluation scheme, instruments
 - c. end-of-course or summative evaluation scheme, instruments

E. Delivery plan

1. Tutorial centres
 - a. number required
 - b. suggested locations
 - c. proposed schedule of tutorials
2. Tutors
 - a. number required
 - b. qualifications
 - c. training workshops, including number, duration, and location
3. Residential schools
 - a. number

- b. location
- c. schedule
- 4. Practical work
 - a. laboratories
 - b. teaching practice
 - c. fieldwork

F. Course budget

- 1. Revenue
 - a. course fees
 - b. other sources
- 2. Costs
 - a. course components production
 - b. produced in-house
 - c. purchased
 - d. leased
- 3. Copyright clearance, with estimates based on
 - a. number of articles to be reproduced
 - b. sources
 - c. total number of pages
 - d. print run
 - e. course shelf life
- 4. Development personnel
 - a. person-days for in-house staff
 - b. fees for contracted external staff
- 5. Delivery and evaluation
 - a. tutorial wages
 - b. marker fees
 - c. monitoring and evaluation costs

4.2 Contracting development personnel

Discussion: Draw on your participants' experience or plans to emphasise the aspects of contracting staff that will be issues for them.

Who is employed to write courses for open and distance learning? There are three important variations to consider:

- full-time academics in a dedicated distance teaching institution;
- academic staff in a mixed or dual mode institution; and
- people who are commissioned to prepare material or contribute to the course team.

There are variations on these themes as well, as in the case of full-time academic staff who take on many or all of the following tasks:

- write material for course teams;
- supervise contracted writers;
- edit materials submitted by outside writers;
- monitor the marking of assignments;
- train new faculty members; and
- draft and present video and audio programmes.

In conventional institutions where academics are required to volunteer to prepare course material, the most critical issue is incentives. When someone already has a great deal of work, why should an effort be made to prepare distance materials?

Rewards need to be evident, in the form of

- extra pay;
- new skills; and
- increased status.

When using part-time contracted writers, there are important issues to consider, including:

- *copyright*: held by institution or author?
- *use*: who has rights to use of the material, to alter it, to reject it if unsuitable?
- *reproduction rights*: who has the right to reproduce material, and under what conditions?

These issues are reflected in the contract that is drawn up with the writer. Here is a sample contract, with comments on what the various clauses imply:

Sample contract

Contract wording	Interpretation
<p>AN AGREEMENT Date 19 made between (the College) of (address) and (the author) of (address) WHEREBY IT IS AGREED as follows:</p>	<p>The contract starts with the date, and the names of those agreeing. A separate contract needs to be signed by each writer, if there are several.</p>
<p>1. The Author shall write a course (defined in the Schedule) and shall deliver the typescript/disk to the College on or before the day of 19 .</p>	<p><i>Clause 1</i> A full description of the writing job is given in the Schedule at the end. The writer is specifically asked to deliver material in a particular format, and the deadline for delivery is given.</p>
<p>2. The Author hereby warrants that he/she has not granted any licences or rights in respect of the course unit to any person, company or firm and that he/she is the owner of the copyright of any illustrations or material in any medium provided in accordance with this agreement.</p>	<p><i>Clause 2</i> asks the writer to affirm that he or she has not given permission for anyone else to use the material, and has not used anyone else's material. This means that if the institution comes across the materials published elsewhere, they can accuse the publisher of infringing copyright. If, on the other hand, the writer is dishonest and 'borrows' large amounts of material from another publication, then the institution can say that the writer is responsible and the institution published the material in good faith.</p>
<p>3. In consideration of the sum of \$..... to be paid by the College to the Author after approval of the completed typescript/disk by the College the Author assigns to the College the copyright in the course units for all purposes.</p>	<p><i>Clause 3</i> specifies the fee and says it will only be paid after the typescript/disk has been approved (not just received). Once it is approved, the copyright belongs to the institution.</p>
<p>4. The Author shall not publish or license the publication in any form of the course units or any of them or any part of them after they have been approved by the College in accordance with Clause 3.</p>	<p><i>Clause 4</i> complements clause 2 and covers copyright after approval of the writing.</p>
<p>5. The College or such other person as may be authorised by the College may make such alterations to the course units by way of editing punctuation, spelling,</p>	<p><i>Clause 5</i> allows the editor or anyone else appointed by the College to change the text, without necessarily having the writer's approval.</p>

abbreviations, grammar, or otherwise as the College or such person in his/her discretion shall think fit.	
6. The Author shall at no expense to the College on receipt from the College of the proofs of the course units check the proofs for errors or omissions and shall return them to the College within days signed.	<i>Clause 6</i> asks the author to check the proofs for no extra fee, and implies that if the proofs are not returned by a given date, the writer will have no right to complain about errors.
7. The Author will at the request of the College and at his own expense make such changes or corrections in the course unit as the College may require PROVIDED that such request is made within a period of 12 months from the acceptance of the course unit by the College.	<i>Clause 7</i> says that the writer must revise the units as necessary, and for no extra fee, provided the request is made within a year after the acceptance of the units.
8. The College will at its own cost reproduce, circulate, and distribute the course.	<i>Clause 8</i> says the institution will pay for printing and distribution, but the clause does not oblige the institution to go ahead with the printing. It only says it will pay if it does print.
9. The College will bear the reasonable travelling and subsistence expenses for any journeys the Author undertakes at the request of the College.	<i>Clause 9</i> says that expenses are paid only if the institution has approved the journey in advance.
10. No fee shall be payable whether by way of quantum meruit or otherwise for any course units delivered after the date stated in paragraph 1.	<i>Clause 10</i> says if you are late with your units, you do not get paid.
THE SCHEDULE Subject matter: Number and description of units: Illustrations: Learners' work and assignments: Other teaching aids:	<i>The schedule</i> is filled in to include all the material the writer must provide. This contract omits a heading for work on course planning and outline (the course blueprint), which may be the subject of a separate contract.
Signed for(College) Date Signed (writer)..... Date	

Discussion: Ask your participants to discuss the pros and cons of this contract, for the institution and for the writer. What protections does it offer the institution? the writer? Is the contract clear enough on questions of legal responsibility? What about libel and other forms of misrepresentation? What about royalties? the procedure for approval? payment schedule? dispute resolution? And so on. Emphasise the importance of the form a contract takes, and the difficulty of writing a satisfactory contract.

The case study for the University of Botswana discusses the issues surrounding training and managing writers of materials for open and distance learning in some detail.

4.3 Copyright

One of the most important legal issues raised in the preceding discussion is copyright. Copyright is an important issue for developers of open and distance learning materials, in two ways:

- as holders of the copyright on any material produced in-house; and
- as users of material for which copyright is held by other individuals and agencies.

As holders of the copyright on any material produced in-house

Where possible, institutions should hold copyright over materials for whose development they have paid, rather than allowing copyright to rest with the individuals involved in development and production.

As users of material for which copyright is held by other individuals and agencies

As a general rule of thumb, permission of the copyright holder should be obtained in order to reproduce (or translate) excerpts from text material that are more than ten lines in length, as well as any diagrams, graphics, photographs, cartoons, and so on.

Costs of copyright clearance

The costs of copyright clearance for print material will vary depending on the following factors.

The intended use of the end product (for example, a course)

- If your uses are non-profit and educational, clearance costs will likely be lower.
- If your uses are commercial and profit-making, costs will likely be higher.

The geographical distribution of the end product

- If you will be distributing the course internationally, clearance costs will be much higher than if you distribute only nationally.

The amount of material for which clearance is requested

- Permission to use twelve lines of prose may cost little if anything; reprinting a chapter from a book may cost considerably more. If you ask permission to reprint more than two chapters of a book, you will likely be told to buy the book!

The size of your print run

- Some copyright holders charge on a sliding scale, so that clearance for reproduction of an item in 5,000 copies of a course may cost far more than ten times the cost of reproducing that item in 50 copies of a course.

The time period over which your product will be available

You may be able to obtain clearance only on an annual basis, or a three-year basis, and so on.

The type of organisation that holds the copyright

- Some organisations (for example, many educational institutions) typically do not charge for the right to reproduce; some commercial publishers charge very high fees; and some publishers (for example, some academic journals) will not give permission under any circumstances.

The medium of reproduction

- Clearance for use of material in electronic form, especially transmitted electronic form (for example, the World Wide Web) will cost more than will clearance for use in print form.

4.4 Scheduling course development

The following steps are typically involved in drawing up a schedule for development of a course.

- Establish the date by which the course must be in learners' hands.
- On that basis determine when the course must be in the warehouse ready for dispatch.
- On the basis of the warehouse date, determine how much time needs to be allocated to physical reproduction, binding, packaging, and so on, including media components other than print. Also make sure that purchased or leased components have been ordered in time for their assured arrival by the warehouse date.

- On the basis of the date by which the course has to be in the print shop, determine how much time the visual designer or layout technician will need in order to prepare the manuscript for printing, complete the visuals and cover design, and so on.
- On the basis of the date by which the entire manuscript must be in the hands of the visual designer, determine how much time the development team will require to produce the manuscript (experienced course developers are tempted to say, ‘And then double it!’).

There is no firm guideline to help you here, except to warn you that the development process, especially the more creative parts of it, are likely to require far more time than you really have available and continual negotiating, wheedling, cajoling, and/or threatening will be required in order to meet deadlines.

Discussion: Draw up an actual production schedule, putting in the dates your participants suggest. Then discuss how realistic these dates really are, both in terms of their organisation’s ability to hold to them and in terms of the pressures on them to have courses in delivery.

5. Managing course production and delivery

5.1 Terminology

The term *production* is used here to describe the overall process of taking a manuscript and managing it through to printed, finished copies.

- It involves drawing up a specification and production schedule, obtaining and comparing prices from different suppliers, placing orders, and supervising manufacture and delivery.
- It involves understanding the needs of course planners, developers, authors, illustrators, and editors, as well as the needs of learners.

The term *printing* is used to describe the actual manufacture of printed distance learning materials. Printing is the industrial process or processes required to realize the production manager’s requirements in their final physical form.

5.2 The process

The course production process involves a number of stages, as follows:

Generating text and illustrations

Most text is now word processed. Desktop publishing makes it possible

- to integrate text and illustrations;
- prepare text in a wide variety of typefaces; and
- see the complete pages on the computer screen in exactly their printed form.

Writers typically submit disks, prepared in accordance with the house style.

Editors work with these disks and submit the entire edited text to the desktop publishing specialist to produce the specified design.

Designing materials

Design involves a number of decisions, particularly about:

- page size;
- layout and house style; and
- cover design.

Preparing materials for the printer

Course materials can be put together in their final form and sent for printing in various ways, including:

- *camera-ready copy*: complete pages, with final text and illustrations in place;
- outputting text directly on to film, or to the printer; and
- *paste-up*: necessary if illustrations and text are prepared separately.

Printing the materials

The choice of printing processes includes:

- photocopying;
- laser printing;
- stencil duplicating;
- small offset printing;
- sheet-fed offset printing; and
- web-fed offset printing.

The decision will depend on

- the equipment available;
- the number of copies of the text required; and
- the prices submitted by the printers who are asked to give quotations

Finishing the materials

The term used to describe the various processes involved in turning the printed sheets into a finished text is 'finishing'. These processes include

- *binding*: saddle-stitched, side stabbed, perfect binding, loose-leaf, wire, or comb;
- *cover*: board, either laminated, or varnished; and
- *packing*: bulk packing up to 15 kg maximum for easy handling.

Management issues

Issues involved in managing the production process include the following.

Estimating, costing, and financial control

Increasing the size of print runs is tempting, because of the lower unit costs that result. Other factors to be kept in mind, however, include:

- warehousing costs;
- the cost of money;
- the sales pattern for each title; and
- the timetable for updating each title.

Scheduling and controlling production

When a new course is planned, a rough schedule should be drawn up, with dates:

- by which authors should submit manuscripts;
- for the completion of each round of proofs; and
- for trial testing.

It is wise to build in a substantial contingency allowance, as emphasised in earlier discussion.

Warehousing and stock control

Holding stock leads to a number of costs:

- the storage space itself;
- wastage through deterioration or loss;
- over-producing stock that is not actually needed;
- money tied up in stock; and
- staffing to monitor and control stock.

6. Managing materials distribution

Compared to conventional institutions, open and distance learning presents some unique challenges in providing learners with instructional materials. When learners attend classes, they normally purchase or borrow books and other equipment from a bookstore or other centralised distribution system. For distance learners, other methods of distribution need to be set up.

The three most common methods of distribution are:

- *learners collecting materials for themselves* (for example, using local centres): are learners close enough? do you have enough staff?

- *using the postal system*: how reliable is the postal system? how long will materials take to reach learners by post? will learners be at home to receive them? do they need to be registered or insured?
- *using courier services*: couriers provide faster delivery and door-to-door service but cost substantially more than the postal system.

If media other than print are included in the course, other issues arise:

- Are there deadlines by which learners must receive materials (for example, broadcast schedule start dates)?
- Are you loaning equipment to learners (for example, computers, video cassette recorders, video cassettes) so they can complete the course successfully?

Again, for discussion of actual production and distribution problems, build on your participants' own context and experience for examples.

6.1 Technological innovations

For open and distance learning programmes that use computer-mediated communication extensively in their delivery system, the possibility exists to forego the production of 'hard copy' materials altogether, whether in print, cassette, or other forms, and rely exclusively on electronic delivery for materials dispatch.

For example, course materials can be supplied to learners on a compact disc, from which learners can print out hard (paper) copy if they wish or work entirely from their computer screens.

Another possibility is for learners to download course materials directly from e-mail or the World Wide Web, again to a paper or electronic file.

These 'paperless' modes of materials dispatch offer a number of advantages:

- decreased need for warehousing space and warehousing and dispatch staff;
- reduced postage or transport costs;
- flexibility for the learner in terms of what portions to print and which to leave in electronic form;
- 'just-in-time' delivery to the learner, since learners can access the learning materials they need just when and where they need them;
- integration of a variety of media — text, graphics, pictures, video, audio — on CD-ROM and World Wide Web courseware;
- in the case of the World Wide Web, access to material from hundreds of thousands of other sites, some of which can be linked directly to the original access site; and
- integration of communication links to tutors and other learners via the Web site.

As with every choice of medium in open and distance learning, constraints also apply. These include:

- the need to train staff in developing materials appropriate for these media;

- the need to train staff to use the technologies effectively to support learners;
- the need to train learners in using the media effectively, or alternatively, to designate this expertise as a prerequisite for entry into the programme;
- reliable and affordable access by staff and learners to the technologies required; and
- the need to continue to support staff, and perhaps learners, in the use of these technologies (although a programme may also make clear to learners that they are expected to solve their own technical problems in using the hardware and software).

Discussion: See the case study for Deakin University for a brief account of Deakin's digital storage of course materials, and the case study for the Open Learning and Information Network for an account of an institution that delivers courses via the World Wide Web.

7. Practice exercise

7.1 Issues in development and production

Instructions: Based on other work they have done in the workshop, the assumption is that participants will be prepared by this point to apply what they have learned about management of open and distance learning units.

Two sets of issues arise in the organisation and management of materials production:

- Should the design and development of materials be done in-house or contracted out?
- Should there be a centralised course development and production unit, or is this function better decentralised to each academic unit in the institution?

Divide participants into four groups. Assign one 'side' of each of these issues to each of the groups and ask them to produce a list of reasons why, for example, the production of materials is best done in-house. Give the groups about 20 minutes for this exercise, and then ask them to present their lists to the group as a whole. During whole-group discussion draw out the difficulties of making blanket statements about which system is best, since there are so many variables, such as institution size, which affect this decision.

Timeframe: Approximately one hour.

Materials: Flipchart paper or overhead transparencies and pens.

TOPIC 7

Managing Learner Support Systems

Overview

Source materials for this topic

Providing learner support

The issues

Problems distance learners face

Special needs of distance learners

Roles of support services at key times in the learning cycle

Role of face-to-face support

Instructional support

Role of instructional support

Academic advice

Non-instructional support

Admission and registration

Counselling

Administrative support

Library services

Finance

Management checklist

Practice exercise

Making the case for tutorial support

1. Overview

These materials support a discussion on the topic of the issues that confront open and distance learning programmes in delivering courses and providing support to learners. All education programmes must support learners in a variety of ways, including counselling and advising, and providing library services or perhaps special tutorials. The emphasis in the materials that follow, however, is on providing support to learners who are studying at a distance, and the particular problems and issues that distance raises.

The first subsection deals with general issues in providing learner support in open and distance learning and the second deals with the types of support that are provided.

The section closes with first a checklist of questions that open and distance learning providers can ask of their particular programme to ensure that they are providing quality services to learners and, finally, another practice exercise.

1.1 Source materials for this topic

The Commonwealth of Learning. *Perspectives on distance education: student support services*. Vancouver: COL, 1992.

Evans, T. *Understanding learners in open and distance education*. London: Kogan Page, 1994.

Lewis, R. *Tutoring in open learning*. Lancaster: Framework Press, 1995.

Mills, R., and A. Tait. *Supporting the learner in open and distance learning*. London: Pitman, 1996.

2. Providing learner support

2.1 The issues

The issues involved in providing support to distance learners emerge in answering questions like the following:

- What are the characteristics of open and distance learning that determine the support needs of distance learners?
- What are the main roles of learner support in the light of these needs?
- What are the different stages in the learning process at which learners require support?
- What are the essential characteristics of a successful support system?

2.2 Problems distance learners face

Distance learners face problems that include:

- isolation in that distance learning participants may have little or no opportunity for face-to-face contact with the institution, their tutor, or fellow learners;
- difficulty organising studies and finding sufficient time to study;
- difficulty balancing work, study, and family commitments;
- lack of motivation;
- lack of resources and equipment – in that learners may not have access to specialist libraries or practical equipment needed for studies; and
- difficulties in developing appropriate study techniques such as note taking and essay writing.

Discussion: What problems have distance learners faced in your own and your participants' experience? The case studies that are included in this kit also provide examples of learner support needs and methods.

2.3 Special needs of distance learners

Distance learners have special needs, which include:

- information to help learners relate to the institution and understand its system;
- contact with tutors to help maintain motivation and overcome learning problems;
- institutional identity, which is some means of helping learners identify with a remote institution and to feel that they are part of a body of learners rather than studying in isolation;
- advice on how to study; as well as that provided within the course itself, learners often need additional support to develop good study techniques.

2.4 Roles of support services at key times in the learning cycle

Some of these support service needs of distance learners are indicated in the following table.

Stages in the Learning Cycle

Stage in learning cycle	Learner needs
Pre-enrolment	information about the institution and its courses advice on which courses to choose advice on how to finance studies
Enrolment and starting study	more detailed information about the institution and study procedures advice on studying at a distance advice on planning studies
Completion and graduation	notification of exam results career advice advice on further studies

Discussion: Provide an example of a working support system with which you and your participants are familiar. A variety of examples of learner support systems are also contained in the case studies that accompany this kit.

2.4 Role of face-to-face support

As discussed in Managing Open and Distance Learning Programmes (Topic 4) of this kit, many open and distance learning providers maintain a network of ‘access centres’ or ‘learning centres’ in order to provide learners with localised delivery of learning

materials and support. Such networks often include facilities provided by other agencies and institutions such as including classrooms for tutorial sessions, library, and study space, and in some instances laboratory space and co-operating staff.

Access centres of this kind afford a number advantages to learners :

- they provide localised, personalised service to learners;
- they strengthen the local identity of the programme or institution;
- they can reduce turnaround time in the return of feedback to learners on assignments;
- they can provide enhanced support to learners, via laboratories, library resources, computing facilities, audio and video conferencing;
- they provide sites for regular meetings and tutorials; and
- they provide the programme with direct feedback on its performance.

Examples: The Bangladesh Open University has a network of twelve regional resource centres, soon to be expanded to fourteen, to which learners come to register for courses, collect learning materials, check examination results, get information about BOU programmes, and seek advice and help with studies. These regional resource centres are the nodes of a country-wide network made up of three types of centres:

- local centres, located in municipal centres, where learners can receive information;
- tutorial centres, located in colleges; and
- teacher training institutes, where learners go twice monthly for face-to-face tutorial sessions.

See the case study for Charles Sturt University for an account of an institution struggling with the issue of whether to continue its face-to-face residential schools or to offer learner support in some more independent, mediated manner.

The case study for the University of Nairobi Distance Education Teachers Programme also discusses the issue of residential schools, in this case the challenge of replacing tutorial sessions increasingly with residential schools.

3. Instructional support

3.1 Role of instructional support

Usually the key support function in open and distance learning is that of providing tuition and academic advice. The cost of providing tutorial support often represents a substantial proportion of the distance learning unit's overall budget. Careful

organisation in this area is therefore important for the efficient running of the distance learning unit as a whole.

3.2 Academic advice

All tutorial methods allow learners and tutors to interact, so learners can benefit from the advice of tutors and get the most from their materials.

At a minimum, in all learning systems ways have to be found

- to inform learners of who is their tutor;
- to inform tutors of who their learners are; and
- to enable learners and tutors to communicate.

Because of the differences in the media used for communication, tutorial models have different characteristics, as summarised in these questions:

- Does the tutor–learner dialogue take place synchronously or asynchronously? That is, do the tutor and learner need to interact in real time or can a response be delayed?
- Do learners interact solely with a tutor or do they also interact among themselves?
- Can learners access the tutorial service from home or do they need to travel to an access centre?

The table on the following page identifies the management requirements for systems with these characteristics.

Management Requirements for Support System

Characteristic	Requirements of system
<p>Synchrony</p> <p><i>Examples: learners attend scheduled face-to-face or audio conferenced or video conferenced tutorial sessions</i></p> <p>Asynchrony</p> <p><i>Examples: learners can telephone or e-mail their tutors individually, or communicate with tutors and other learners via computer conferencing</i></p>	<p>High requirement for detailed scheduling</p> <p>High need to monitor technical performance of delivery medium as breakdown is a critical problem</p> <p>High need for on-hand technical support</p> <p>High training requirement so learners will master medium</p> <p>Highly desirable to provide flexible temporal access to system</p> <p>Lower need for monitoring technical performance than for synchronous systems, as downtime can be overcome later and learner can re-enter the system</p> <p>Technical skill or operation of system by learners can be gained over a longer period, because mistakes are not as critical as in synchronous systems</p>
<p>Tutor–learner interaction only</p> <p><i>Example: one-on-one telephone tutorials and tutorials by post</i></p> <p>Tutor–learner and learner–learner interaction</p> <p><i>Example: any of the conferencing media, face-to-face tutorials</i></p>	<p>Higher need to guarantee learner access to some minimum guaranteed amount of time</p> <p>High need to ensure tutor availability at regular times</p> <p>Lower need to schedule interaction in a precise manner</p> <p>Requirement to provide inter-group access</p> <p>High need to schedule group interaction if interaction is also synchronous</p> <p>High need to ensure consistent technical performance of technology being used as downtime will affect multiple users</p> <p>Learner needs to be informed of how and when to access system</p>
<p>Access from home</p> <p><i>Example: computer conferencing</i></p> <p>Access through study centre</p> <p><i>Example: face-to-face</i></p>	<p>Scheduling is critical if synchronous group interaction is to occur</p> <p>Learner needs to be trained at a distance to use the system</p> <p>High need to organise a facility at which learners meet</p> <p>High need to schedule group meetings and inform learners</p> <p>High need to ensure performance of technology used.</p>

4. Non-instructional support

Though less visible than instructional support and less central to the actual process of learning, non-instructional support is vital to the smooth operation of distance learning and must be integrated with instructional support. Generally speaking, the following types of learner support are available.

4.1 Admissions and registration

The admissions and registration support subsystem includes the following functions:

- marketing;
- facilitating applications;
- making offers;
- registering learners; and
- matching learners appropriately with courses by level, subject, and so on.

4.2 Counselling

Learner problems that require referral to counsellors include:

- financial difficulties;
- family problems;
- difficulty in maintaining motivation;
- problems in finding sufficient time to study;
- balancing conflicting commitments; and
- physical difficulties or barriers, including limited mobility, hearing, or sight impairment.

4.3 Administrative support

A distance learning unit or institution needs to inform learners of the following kinds of information:

- the office hours;
- the best times to call for advice;
- any days when the office is closed;
- the name of the learner's tutor;
- how to contact the tutor;
- who to write to or telephone about different matters;
- deadlines for sending in tutor-marked assignments; and
- dates of examinations.

Depending on the tutorial system that is in place, other required information may include:

- location and hours of nearest learning centre;
- facilities available at learning centre;
- names and addresses of other learners (with their permission); and
- updates on curriculum changes, procedures, and so on.

4.4 Library services

Most open and distance learning programmes do their best to provide learners with complete learning packages that contain all the materials they will need to complete the course. Nonetheless, learners will from time to time need access to other resources of the kind typically found in libraries, and distance learning providers need to create this access. There are a number of ways of doing so, depending on the resources available not just within the institution itself but also from other providers. These include:

- circulating books and other resources from the institution's own library by post, even though this is expensive and relies on the existence of adequate postal services;
- providing copies of reference books and other resources in the access centres;
- providing mobile libraries, usually buses, which are fitted out with shelves and books and which travel from community to community;
- making arrangements for learners to have access to the libraries of institutions or agencies in their local area such as schools and colleges;
- encouraging learners to apply for reading or borrowing privileges at local libraries; for example, the British Council has libraries in major cities throughout the world; and
- training learners in how to find, select, and download resources from the Internet and in particular the World Wide Web.

4.5 Finance

Part-time learners are typically disadvantaged in awards schemes. Distance learning programmes therefore typically seek scholarship and bursary funds, which entails fundraising as a function.

5. Management checklist

To determine whether your support system is successful, you will need to ensure that you have effective methods of getting feedback from your learners, using focus groups and surveys to find out what problems your learners and tutors are having. In addition, you will need to have effective quality assurance systems in place as discussed in Performance Indicators (Topic 9) in this kit, in order to monitor system effectiveness on an ongoing basis and correct any shortcomings you discover.

Checklist for Successful Delivery and Learner Support

- ❑ Do you know your learners' geographical location, age range, access to facilities, academic ability, gender, and so on?
- ❑ Are staff sensitive to gender, societal, and cultural differences?
- ❑ Are staff sensitive to the frustrations and time constraints adult learners often face?
- ❑ Do staff have up-to-date knowledge about the institution and its courses?
- ❑ Are your support systems flexible and learner-oriented, available to learners when and where they need them?
- ❑ Are the resources allocated to learner support adequate?
- ❑ Is there an appropriate balance of resources allocated to the development of materials and subsequent support of learning from those materials?
- ❑ Does your support function provide support to the internal functions of the distance learning unit as well as to learners?
- ❑ Is your decision to keep support services centralised, or to manage them on a regional or decentralised basis, appropriate to meeting the needs of your learner population?
- ❑ Does your learner record system contain the following information:
 - personal details, including name, address, age, family circumstances, and employment?
 - academic and professional qualifications?
 - special requirements such as specially adapted materials for disabled learners?
 - tutorial record, including dates when assignments were received, grades, and copies of tutor comments?
 - list of materials sent, including date of dispatch?
 - record of attendance at face-to-face sessions?
 - fees paid?
- ❑ Are your records detailed, accurate, and up-to-date? Do you ensure that:
 - records systems are regularly monitored to ensure they are functioning efficiently?
 - information is disseminated to the right people at the right time?
 - records are kept in a secure fashion so that only authorised personnel have access to them?
 - legal requirements governing the handling and storage of information are met?
- ❑ Are your support staff, whether instructional, counselling, or administrative, trained and updated on an ongoing basis?

6. Practice exercise

6.1 Making the case for tutorial support

Instructions: Divide the participants into two groups. Describe the following scenario and situation to both groups.

- *Scenario:* An open and distance learning unit has been in operation for eighteen months now at Prestige University. For the past six months this unit has actually delivered three courses by distance, using a basic correspondence model. Learners can telephone the unit if they have problems, but there is no continuous assessment provided and learner performance is assessed only by the final examination, which learners must sit at the same time — indeed in the same examination hall — as the on-campus learners in the course.
- *Situation:* The director of the open and distance learning unit is meeting with the Pro-Vice Chancellor, Learner Services, to whom she reports, to argue for more funding so that tutors can be paid to support learners during the course and not just to mark the final examinations.
- *Task:* Group One is the Pro-Vice Chancellor group. Their task is to come up with arguments, from a strictly conventional, campus-based point of view, as to why learners ought not to need this ‘special’ service. Group Two is the distance education director group. Their task is to come up with arguments from the point of view of the distance education unit as to why learners must have the services for which the director is asking. Ask each group to supply a ‘role player’ who will play out the meeting situation with his or her counterpart, and argue the case that the group has developed.
- *Discussion:* Draw out some of the issues and problems that confront open and distance learning managers in trying to provide adequate support services to their learners.

Timeframe: An hour should be adequate for most groups.

Materials required: None.

TOPIC 8

Managing Staffing and Training

Overview

Source materials for this topic

The changing context

Social context and clientele

Generation

Financial considerations

Institutional pressures

Societal changes

National programmes

Changing technologies

Staffing needs

Leadership

Administration

Teaching and course development

Teaching, tutoring, and learner support

Logistics co-ordination

Research and evaluation

Training needs in open and distance learning

Why is training needed?

When is training needed?

What kinds of staff need training?

What problems do organisations face when implementing staff training?

How closely is training linked to strategic programme goals?

What are the steps in implementing a training programme?

What modes of training are available?

How is training needs analysis conducted?

What needs to be done to make training immediately useful on the job?

How can training be evaluated?

Practice exercise

Linking staff training and programme goals

1. Overview

These materials support a discussion on the topic of the staffing needs of open and distance learning institutions, and the kinds of training these staff require once they are in place. These needs are placed in the context of open and distance learning programmes overall, and in the context of the changes to which they are subject.

First, staffing needs are presented. The competencies required for each function are listed, as are the likely roles in which these competencies can be found in open and distance learning programmes, both as programmes are emerging and as they mature. Second, training needs are outlined in a set of questions about staff training.

1.1 Source materials for this topic

O'Rourke, J. *Roles and competencies in distance education*. Vancouver: The Commonwealth of Learning, 1993.

Robinson, B. Training and staff development for distance education: a strategic perspective. In *Training and professional development in distance education*. Vancouver: The Commonwealth of Learning, 1997.

2. The changing context

A critical task for planners, policy makers, and others responsible for setting up and managing an open and distance learning programme is the management of staffing and training needs.

This section will provide some guidelines for answering these two questions:

- What are staffing needs in open and distance learning programmes?
- What are the training needs for these staff?

First, however, it is useful to remind ourselves of the changing contexts in which we may be tackling these questions. Here are some of the factors that may change the staffing and training needs for successful operation of open and distance learning programmes.

2.1 Social context and clientele

Guidelines developed for a tertiary-level, single mode institution in an industrialised country may be of limited utility for managers of, say, training programmes for untrained primary teachers in a country with a primarily agriculturally based economy and a rural population.

2.2 Generation

Some institutions and organisations have been providing distance learning materials and services for decades. Others are just beginning, and may still be in the planning stage. Staffing and training needs for a 'second-generation' organisation are going to differ considerably from those of an emerging institution or an incipient open and distance learning programme.

2.3 Financial considerations

In almost all contexts the pressure is on open and distance learning programmes to demonstrate that they are spending wisely and effectively the funds invested in them, that they are avoiding duplication, and that they have a coherent rationale for their staffing levels and training programmes. There are likely real limits to the number of staff who can be brought on board, or kept on board.

2.4 Institutional pressures

In many institutions open and distance learning programmes are required to be self-financing, or even to make a profit for the institutions. There are also open and distance learning organisations, of course, that operate entirely on the basis of the fees they raise from learners and project- and grant-funding from donor, sponsor, partner, or client organisations. In some institutions there may be pressures to integrate open and distance learning completely within the institution, which have serious implications for staffing – (for example, see the case studies for Deakin and Murdoch Universities). Increasing decentralisation to regional centres of responsibility for developing materials and supporting learners also impinges on staffing decisions.

2.5 Societal changes

As lifelong learning becomes more accepted, the variety and scope of contexts for open and distance learning approaches expand. Distance educators may find themselves working anywhere from the shop floor to rural extension programmes to community learning centres to university classrooms.

2.6 National programmes

As open and distance learning develops in support of a national system of education, especially at the tertiary level and in technical or vocational areas, there may be more need for roles in co-ordination and direction from a national or regional perspective, again with implications for staffing and training. The Indira Gandhi National Open University plays this role within India.

2.7 Changing technologies

Technologies are converging. For example, courseware can be made available to learners via the World Wide Web that incorporates text, graphics, video, and audio, with e-mail and other links to tutors and other learners. There is also a convergence of distance and face-to-face provision, in the form of flexible learning programmes in which learners can choose the learning mode or modes they prefer for tackling some particular learning problem. These instances of convergence mean that staff with responsibility for developing materials and supporting learners must become familiar and comfortable with a wide range of technologies. Even though these latest technologies are still too costly for many open and distance learning providers, especially those in less affluent countries or regions, staff need to be made aware of the possibilities and potential available in these technologies, should the day come when they and their learners are able to use them.

See the case studies for Deakin University, Murdoch University, and the Open Access College for discussions of these issues; also the case study for the Open Learning and Information Network discusses issues arising from offering courses via the World Wide Web.

3. Staffing needs in open and distance learning

What kinds of staff are needed to set up and run an open and distance learning programme?

One useful way to answer this question is in terms of the competencies that are essential for open and distance learning. These competencies can be held by people in a number of different roles in different situations; therefore roles are also addressed.

The lists below identify:

- the kinds of competencies needed for the start-up, implementation, and ongoing operation of open and distance learning programmes; and
- the roles in which those competencies are most effectively held.

Roles differ within organisations, depending on context, objectives, size, and stage of development.

The competencies are not presented in rank order of importance. All are considered essential. However, not all the attributes of, say, leadership are necessarily collected within one individual. Ideally a team of people share leadership competencies and complement each others' attributes.

Discussion: For each of the six areas or functions listed, you might wish to draw from your participants the roles in their particular programmes in which the competencies outlined are likely to be found.

3.1 Leadership

Competencies of leaders in open and distance learning

In successful open and distance learning programmes there tend to be key persons with the vision, influence, and leadership skills to get the project off the ground and nurture it through the early years. The attributes of leaders in open and distance learning tend to be:

- vision of the rationale, scope, and potential impact of an open and distance learning programme in their own context;
- clear view of prospective participants and their needs;
- access to financial and human resources, access to decision makers who have access to those resources, or both;
- senior decision making authority and respect within the organisations;
- credibility among teaching staff;

- an understanding of how open and distance learning works and an overview of the planning, resource allocation, and promotional tasks required to launch it;
- an understanding of how their own organisation works and of how open and distance learning will affect existing systems;
- an understanding of the relationship between the proposed open and distance learning project and other educational providers within the region;
- ability to communicate and co-ordinate open and distance learning endeavours with other educational providers in the region, to ensure accreditation is recognised, duplication of provision is minimised, and so on;
- ability to convey to others in the organisation the value of open and distance learning and earn their support for the project; and
- ability to identify training needs and provide learning opportunities about open and distance learning processes to teaching staff and administrators responsible for implementing the project.

Roles of leaders in open and distance learning

The leadership competencies could be in one or several key individuals within an organisation. Positions within an organisation that lend themselves to effective use of these competencies to launch an open and distance learning project are:

- senior administrator, such as principal or vice-principal, pro-vice chancellor, or dean of continuing education;
- senior member of teaching staff, such as a professor, senior lecturer, or department chair;
- senior ministry of education staff member who can be seconded to full-time work on the project; and
- senior staff member in a private or non-profit organisation, for example, director of human resources, training, and so on.

After the programme is launched, and roles and positions are finalised, individuals in a leadership role may continue their work from the position that they hold, or take on a formal role as:

- principal of open and distance learning institution or programme;
- academic director of open and distance learning programme;
- director of continuing education; and
- senior administrator of open and distance learning.

3.2 Administration

Competencies of Administrative Personnel

Ideally administrative personnel share the same vision of open and distance learning as the individual or individuals in the project's leadership roles. They should provide administrative competencies that include:

- vision of the rationale, scope, and potential impact of an open and distance learning programme in their own context;
- a clear view of the participants and their needs;
- logistical skills, or the ability to foresee and plan for logistical requirements; scheduling and materials production knowledge; creative problem solving abilities; knowledge of the organisation's infrastructure and of the communications and transportation infrastructure of the region where participants live;
- financial management skills, or the ability to predict costs of each phase and component and to make reasonable decisions about allocation of funds for administrative systems, for course development, for learner support systems;
- an understanding of how open and distance learning works and an overview of the planning, resource allocation, and promotional tasks required to launch it;
- an understanding of how their own organisation works and of how open and distance learning will affect existing systems;
- ability to determine the systems needed to support open and distance learning within a given context, to set up new systems, and to evaluate their effectiveness and modify them if necessary;
- respect and credibility within the organisation; and
- ability to identify training needs and to provide learning opportunities for others within the organisation.

Roles of Administrative Personnel

The types of roles held by individuals who have these competencies can vary depending on the phase of the project. At the initial phase, before the programme is launched, these individuals may be in these positions:

- administrator within an academic unit, such as an administrative vice-president, administration, programme director, or dean;
- manager of an administrative unit, such as learner services registrar; or
- administrator of continuing education.

As an open and distance learning programme is launched, these individuals may occupy the following roles or positions:

- administrator of an open and distance learning unit;
- administrator of continuing education; or

- director of outreach services.

3.3 Teaching and course development

In open and distance learning, teaching responsibilities are usually divided into two phases:

- *course development*: the preparation of course materials; and
- *tutoring*: providing instructional support to learners as they use the materials.

Course development tends to be subdivided further into

- providing subject matter expertise; and
- providing expertise in instructional techniques appropriate to open and distance learning.

Similar competencies are required for both aspects of course development, with some specific competencies required for subject matter specialists and instructional design specialists.

Individuals initially involved in course development would share the vision of open and distance learning the programme leaders propose. The following competencies are important.

Competencies of Programme Leaders

Individuals who act as programme leaders need the following competencies:

- ease with learners; awareness of particular needs and circumstances of learners; skills in dealing with more open ended learning situations;
- ability to plan, schedule, and implement labour intensive tasks, as can be demonstrated by curriculum planning committee work and responsibility for development of special projects; active participation in an examinations board, where applicable;
- knowledge about how open and distance learning works, and about the kinds of resources and timeframes needed for course development; and
- ability to work as a member of a team.

Course developer and subject matter specialist

The subject matter specialist needs the following competencies:

- openness to new ideas and new perspectives on their discipline;
- expertise in a subject area or discipline, and in teaching that subject area or discipline; and
- willingness to learn new approaches to teaching and learning.

Course developer and instructional designer

This individual may be a media specialist or teaching staff member who has a particular expertise in how to prepare materials for effective learning. Competencies and skills required are the same as those required of the teaching staff course developer and course team leader, with the following additions:

- knowledge of the attributes of a range of media, including print, audio, and video, and of their characteristics when used for learning materials;
- skills in the use of at least one medium, and preferably more than one;
- skills in writing and editing, regardless of medium;
- ability to communicate knowledge and skills to others while working with them as peers on course development tasks; and
- knowledge of the logistical requirements of the media in most common use, including in all cases copyright, scheduling of production, and media capabilities.

Roles of Programme Leaders

Prior to start up of open and distance learning, programme leaders could be in any of following roles:

- full-time member of teaching staff;
- part-time or sessional teaching staff, either at main institution or at an off-site location;
- textbook author with teaching experience;
- administrator with teaching experience; and
- media specialist with teaching experience in another discipline.

After the open and distance learning programme is launched, this individual could be designated as a course author, either solo or as member of course team.

Course team leader

Course team leaders need additional competencies:

- course developer, instructional developer, or instructional designer.
- willingness to share knowledge and competence in open and distance learning course development with peers;
- acknowledged competence and credibility among colleagues;
- ability to work with others and provide leadership in labour-intensive, deadline-oriented tasks; and
- ability to communicate and negotiate plan of action and task assignment.

3.4 Teaching, tutoring, and learner support

Competencies of teaching staff

Those in direct contact with learners, in teaching, tutoring, and learner support roles, require the following competencies and attributes:

- ease with learners; awareness of particular needs and circumstances of learners;
- expertise in a subject area or discipline, and in teaching that subject area or discipline;
- knowledge of how open and distance learning works, and about the kind of resources and timeframes needed for open and distance learning course delivery;
- ability to work as a member of a team;
- knowledge of administrative systems within one's own organisations;
- openness to new ideas; new perspectives on one's discipline;
- willingness to learn new approaches to teaching and learning;
- ability to balance demands of discipline with the needs of the learner;
- ability to communicate needs of learner to institution and institution's perspective to learner; and
- interpersonal skills in learner advising, counselling, problem solving.

Roles of teaching staff

As an open and distance learning programme is being launched, teaching staff may be in a role such as:

- director of learner services;
- learner counsellor; or
- academic position such as lecturer or tutor.

After an open and distance learning programme is launched and roles are formalised, this role may become:

- tutor; or
- tutor and counsellor.

Tutorial services and learner counselling co-ordinator

This position requires additional competencies:

- ability to oversee effectively the teaching or advising role of others; and
- ability to provide learning opportunities for others working as tutors.

3.5 Logistics co-ordination

While the roles assigned to the important tasks relating to logistics co-ordination tend to be considered ‘support’ or ‘clerical’, an open and distance learning system cannot operate if the right materials are not sent at the right time, if assignments are not handled correctly, or if provisions are not made for secure operation of examinations.

Competencies of logistics co-ordinator

The individual who acts as logistics co-ordinator needs the following competencies:

- ability to foresee and plan for logistical needs of open and distance learning, schedule, allocate resources, and anticipate potential difficulties;
- ability to communicate equally with clients, learners, and with teaching and administrative staff within the institution to address problems and issues of concern and help to resolve them;
- ability to organise and direct the work of others, to communicate the importance of accuracy and timeliness, and to develop enthusiasm among others for the work of supporting open and distance learning;
- ability to co-ordinate with other organisations and institutions, at a distance, for set-up of study centres, examination centres;
- knowledge of general administrative and financial systems within own institution and of requirements of most commonly used systems, such as payroll, room rental, equipment rental, purchasing; and
- knowledge of stock control systems and of production lead times required to ensure stock levels are maintained.

Roles of logistics co-ordinator

Before the start up of an open and distance learning programme, individuals with these competencies may be in a variety of roles:

- administrator;
- administrative assistant in larger unit;
- office manager;
- senior secretary;
- assistant registrar; and
- unit manager.

After the start up of an open and distance learning programme, the most important logistical roles may be defined as follows:

- learner services administrator;
- information and promotion co-ordinator;
- enrolment co-ordinator;

- assignments and examinations co-ordinator; or
- materials warehousing and dispatch co-ordinator.

3.6 Research and evaluation

Research and evaluation is an important competency at every stage of an open and distance learning programme. Ideally, persons in leadership roles are sufficiently committed to monitoring and evaluating the programme, and sufficiently familiar with basic monitoring and evaluative processes that they can build these competencies into the programme.

Competencies of research and evaluation staff

While not all staff can be expected to have all the following competencies, the following are the ones most valuable in an open and distance learning programme:

- an understanding of the basic goals and procedures of research in education;
- ability to identify which aspects of an open and distance learning programme require ongoing monitoring procedures and which require a specific research project;
- ability to develop needs analysis processes to determine the types of courses and services the open and distance learning units should provide, in consultation with community members, prospective users, and relevant members of the organisation;
- ability to design monitoring procedures that can be incorporated easily into normal administrative processes;
- ability to identify prospective research studies, in consultation with relevant members of the organisation, and in light of current research, unique aspects of the programme, and needs of the programme;
- ability to design methods for data gathering appropriate to the context, given resources available, information required, and expected application of information;
- ability to review results of monitoring to identify aspects of the open and distance learning programme that require attention, either a change in procedures or a further study;
- sufficiently knowledgeable about statistical analysis to identify needs for statistical analysis services and to contract these services; and
- ability to synthesise information and data and prepare a report which identifies significant outcomes.

Roles of research and evaluation staff

Research and evaluation tasks can be delegated to people in positions such as the following:

- institutional researcher (often located in director's or vice-chancellor's office);
- academic staff member; and

- contracted staff with the appropriate expertise.

4. Training needs in open and distance learning

4.1 Why is training needed?

Training of both new and existing staff in open and distance learning programmes is essential to the development of the competencies listed above.

It is important that senior managers see training as an investment rather than a cost, and give it high priority in organisational plans and funding allocations.

It is also important for senior managers to ensure that when training is provided, the organisation is ready to utilise the new learning so that opportunities for capacity building are not lost.

4.2 When is training needed?

The practice of open and distance learning generates a variety of roles and needs. Staff are often required to learn new work practices and skills. Individuals and groups have to:

- take on new roles, especially if open and distance learning is unfamiliar;
- adapt to new ways of teaching and communicating;
- use new technologies which alter familiar processes of teaching and communication;
- manage dispersed and decentralised organisations or complex processes;
- be responsible for supporting learners at a distance;
- develop better skills in teamwork, co-ordination, and the management of schedules and records; and
- take on unaccustomed roles as trainers.

4.3 What kinds of staff need training?

The categories of staff who need training can be grouped as follows:

- newly-appointed staff, needing routine induction and orientation to open and distance learning in general;
- staff taking on new responsibilities and roles;
- staff in traditional institutions adapting existing knowledge or skills to open and open and distance learning applications;
- all staff periodically, to ensure maintenance of skills and standards and their continuing professional development; and
- staff who face specific changes in their work as a result of change within the organisation as a whole (for example, the introduction of a new technology; see the Deakin and Murdoch Universities case studies).

4.4 What problems do organisations face when implementing staff training?

A number of concerns about staff training are commonly experienced by open and distance learning programmes. These include:

- the difficulty of getting institution commitment and resources;
- the inconsistency in training provision within organisations;
- the slowness of organisations to develop policies and plans for staff training, especially for part-time and field-based staff;
- weak integration of training with institutional policy and plans;
- uncertainty about where to locate responsibility for staff training within the organisation;
- the status of training and perceptions of its value amongst staff and management;
- the limited nature of the needs analysis commonly done;
- the weak use of evaluation; and
- discontinuity between training given and its application to ‘real life’ on the job.

Discussion: Ask participants to analyse the role of staff training and professional development in their own organisation and answer the following questions: what categories of staff require training? at what level? how can it be accessed? how can it be financed? Review the case studies for possible ideas for discussion.

4.5 How closely is training linked to strategic programme goals?

Here is a checklist of questions to ask about the links between the training your programme offers and your programme’s goals.

Staff Training Checklist

- Is there a training/staff development policy? Is it widely known?
- How are decisions made about training provision? Who decides? Who are consulted?
- What methods are used to identify staff development needs in your programme:
 - at the organisational level?
 - at the job level?
 - at the person/individual level?
- How well are these levels integrated? Which dominates? Why?
- In what direction does the balance need to change, in your view?

- ❑ How are priorities decided? On what basis?
- ❑ What is the effect of this on training provision?
- ❑ In what ways is staff development provision linked to organisational objectives?
- ❑ How well is it linked? Could the link be strengthened?
- ❑ Who is responsible for this? Who should be responsible at the different levels, in your view?
- ❑ Do training objectives and programmes change as soon as there is a change in the organisation's strategic decisions?
- ❑ When did this last happen in your organisation? What was the outcome?

Discussion: Work through these questions with your participants.

4.6 What are the steps in implementing a training programme?

Whatever policy and strategy for staff training are adopted, the same steps are involved in implementing the plan. These steps are:

- define and agree within the organisation the general and particular needs for training, based on a systematic needs analysis;
- review possible ways of meeting needs and the availability of financial resources;
- establish priorities;
- select appropriate training events and interventions;
- construct a coherent training plan in the light of available resources;
- communicate to all concerned and build a supportive climate for training;
- prepare an evaluation approach and plan;
- provide the training and evaluate its efficiency and effectiveness; and
- use the evaluation data to assess its impact, to improve training provision and to inform future plans.

4.7 What modes of training are available?

Training of staff in open and distance learning programmes can happen in a variety of ways.

- *on-the-job training*: more experienced or senior staff can be assigned to work with new or junior staff on a project to mentor and assist them; this is particularly the case for course authors who are trained in open and distance learning techniques in the context of the course team;

- *face-to-face training sessions*: can happen one-on-one or in small groups, using in-house or imported trainers. They are usually rather formally structured and scheduled; and
- *courses offered face-to-face and at a distance*: a growing number of formal courses are available for training staff in a wide variety of aspects of open and distance learning. Some of these courses require staff to travel to the site where the course is offered, but increasingly these courses are offered at a distance, some of them on-line via the Internet and the World Wide Web. For example, there are a number of programmes available at the postgraduate diploma and master's level in open and distance learning, including those offered by Indira Gandhi National Open University, Deakin University and University of South Australia, University of London and International Extension College, Athabasca University, and the Open University in the United Kingdom. The latter two programmes provide tuition and support to learners primarily on-line.

4.8 How is training needs analysis conducted?

Training needs can be assessed on three levels, at the level of

- the organisation;
- the job; and
- the individual.

An effective strategy is to start at the organisational level and work towards the individual level, although the diagnosis of training needs at an organisational level requires quite sophisticated skills of analysis, evaluation, and diagnosis as well as access to a wide range of information.

The table in the following page shows in greater details the types of analysis that can be done at each level.

Levels of Analysis for Training Needs

Level of analysis	Focus of analysis	Sources of data
Level 1: Organisational	Whole organisation's objectives Pool and pattern of skills and expertise available in staff Indices of effectiveness Organisational climate	Staffing plan and projections Audit of skills and knowledge of staff; identification of any shortages, present and future Efficiency indicators and organisational output Climate surveys Monitoring data from quality surveys Requests from departments and group members
Level 2: Job needs	Particular job or group of jobs Tasks, skills, and standards needed Knowledge, skills, and attitudes needed to achieve standards.	Job descriptions and specifications Objectives, standards, and targets set and priorities identified Work sampling or job observation Asking the job holder and unit head about the job
Level 3: Individual needs	Person analysis in terms of skills, expertise, and competence. Standards of performance at job tasks.	Performance appraisal and identification of development needs. Observation and work sampling. Interviews and questionnaires.

4.9 What needs to be done to make training immediately useful on the job?

Transfer of skills acquired during training to the actual job to be performed is not automatic. A number of factors affect the effectiveness of this transfer, including:

- the nature of the skills learned; for example, interpersonal skills transfer less well than psychomotor skills;
- the time lag between learning something and using it in a 'real-work' context; new skills need to be used in practice before they deteriorate;
- the number of elements common to the training and the job situation; that is, the greater the number, the stronger the transfer;

- perceptions of relevance and quality of the training by participants; and
- attitudes of colleagues, departments, and the organisation as a whole towards the training.

4.10 How can training be evaluated?

Here are a number of questions that can be asked of the training process in order to evaluate its effectiveness.:

Context in which the learning event takes place

- How accurately were needs initially diagnosed?
- What information was used? How was it analysed to establish these needs?
- Was training an appropriate solution to the problem?
- Why was this particular kind of event and form chosen?
- How were learning objectives selected?
- What learning objectives were set? At which level of outcomes?
- How does this learning even link to others in the participant's experience, and to other training events provided? Does it fit with an organisational plan for training?

Inputs to the training

- What resources were available for the training event?
- What were actually used (personnel, physical, and financial resources, time)?
- What were the learning structure, content, media, and methods? Did they incorporate sound principles of learning?
- What was the final cost?
- Was the selection of participants appropriate?
- Did they attend the training provided? What was the take-up?
- Was this the best and most appropriate way of training?

Reactions to the training

- What reactions to the learning event did participants and trainers have?
- Was it perceived to have achieved its original objectives?

Outcomes from the training, as input to planning for subsequent training

- Was it efficient?
- Was it effective?
- Was it cost-effective?

5. Practice exercise

5.1 Linking staff training and programme goals

Instructions: Using the checklist of questions to be asked about linkage between training and programme goals that is provided in the materials, ask each participant to spend about half an hour working through the questions. Once they have provided their own answers, divide them into working groups of no more than five persons, and ask the group to provide answers to the following questions and be prepared to share them with the group as a whole:

- What gaps or weak links were identified?
- How could these links be strengthened?
- What obstacles are envisaged to this strengthening?

Timeframe: 15 minutes for individual work, 30 minutes for small group work, 15 minutes for large group discussion; total one hour.

Materials: None. Formal reporting back from small groups is not required; facilitator can guide discussion by asking groups to supply examples from their discussions.

TOPIC 9

Performance Indicators

Overview

Source materials for this topic

Quality, relevance, and effectiveness in open and distance learning

Quality

Relevance

Effectiveness

Some quality assurance tools

Tracking the source using the five whys

Flow diagrams

Pareto analysis

Fishbone diagrams

Milestones and barriers

Performance indicators

Terminology

Audiences and purposes

Categories

Key programme indicators

Characteristics of 'good' indicators

Concerns about performance indicators

Practice exercise

A working example

1. Overview

These materials support a discussion on the topic of how managers assure quality, relevance, and effectiveness in open and distance learning programmes, and what indicators of quality performance can be used to assess programme performance in those areas.

1.1 Source materials for this topic

Davis, D. *The real world of performance indicators: a review of their use in selected Commonwealth countries*. London: Commonwealth Higher Education Management Services, 1996.

Guri-Rosenblit, S. Quality assurance procedures at the Open University of Israel. In A. Taid (ed.), *Quality Assurance in Higher Education: Selected Case Studies*. Vancouver: The Commonwealth of Learning, 1997.

Robinson, B. Assuring quality in open and distance learning. In F. Lockwood (ed.), *Materials Production in Open and Distance Learning*. London: Paul Chapman Publishing, 1994.

Tait, A. (ed.) *Quality assurance in open and distance learning: European and international perspectives*. Cambridge: Open University, 1993.

2. Quality, relevance, and effectiveness in open and distance learning

2.1 Quality

Terminology

Discussion: You might wish to begin this discussion by asking participants for their definitions of *quality*, posting these definitions where all can read them, and then drawing out the features common to all the definitions.

A dictionary definition of *quality* is ‘the degree of grade of excellence possessed by a thing; peculiar excellence or superiority; capacity, ability or skill’ (*Shorter Oxford English Dictionary*).

Educators have more recently looked to fields such as industry, business, and management for helpful definitions. A typical example: *Quality refers to a product’s fitness for purposed according to a set of required standards*, concentrates on the quality of the product — courses and materials — and is useful for that purpose.

It also ties quality to ‘fitness for purpose’ according to chosen standards or criteria, which points to the relative, not absolute, nature of quality and judgements about it.

But it is probably too narrow to apply to the whole process of open and distance learning. More recent approaches focus on *total quality*, which includes services as well as products, an important inclusion for open and distance learning.

Judging quality

Despite the importance of the service component, quality in open and distance learning is most often viewed in terms of the materials produced. This is understandable for three reasons:

- The course materials are tangible and publicly visible, open to scrutiny by all.

- The materials are the key or sometimes the only means of engaging with the learners in open and distance learning.
- It is easier to see the quality or lack of it in a product than in less tangible aspects such as teamwork or management.

Aspects of quality

Nevertheless, quality of open and distance learning provision does include far more than materials alone. The following framework outlines four aspects of quality in open and distance learning.

Four Aspects of Quality in Open and Distance Learning

The products or outputs	<ul style="list-style-type: none"> • the courses and materials (printed texts, audio, video, and so on) • number of graduates or successful completers • examination pass rates or achievement of intended competencies or practical skills • equivalent results in public examinations
The processes	<ul style="list-style-type: none"> • learning and teaching processes such as tutoring, assessing written work, and providing learner feedback, monitoring field workers and tutors, training group leaders • advising learners and keeping track of them • record keeping • co-ordinating groups of external writers
Production and delivery systems	<ul style="list-style-type: none"> • course production • print production • scheduling and progress chasing • warehousing and stock control • dispatching materials to learners • transmission of radio programmes
As a general philosophy or ethos	<ul style="list-style-type: none"> • policy statements • attitudes of staff • management and training of staff

- motto or slogan (for example, 'Only the best')
- images and messages presented to the public (for example, publicity leaflets, brochures, press reports)

2.2 Relevance

Questions about quality and relevance are closely linked. To be relevant, open and distance learning courses and programmes need

- to meet both the national and local community needs they are intended for; and
- to match their content, design, and choice of media and technology to the intended learners and their contexts.

This indicates that relevance operates on several levels, including:

- policy;
- programme or course;
- materials and their mode of delivery; and
- learners.

Here is a checklist for determining the extent to which open and distance learning programmes, including both courseware and services, are relevant at these various levels.

Checklist for Relevance of Open and Distance Learning Programmes

Policy

- Are the objectives relevant to identified need (national, regional, social, educational)?
- Is open and distance learning the appropriate means of fulfilling these objectives?
- Is the policy realistic in terms of resources, agreed priorities, culture and context?
- Can the open and distance learning programme be implemented through the country's existing infrastructure?

Programme or course

- Does the programme match the policy objectives?
- Is it designed to meet the target audience's need?
- Is it appropriate for the learners and the communities they live in?

Materials

Content

- Are the materials appropriately designed for the policy and programme objectives?

- Are they designed to match the learning levels of the targeted group?
- Are they sound in content and related to the cultural content?

Means of delivery (media and technology)

- Is the choice of media appropriate for the learning task?
- Are they accessible to the learners?
- Is it appropriate and sustainable technology for the content?
- Does it match policy intentions and statements?

Learners: group and individual

- Are the needs and aspirations of the learners met by the programme?
- Is the means of delivery and support appropriate?
- Do the learners have the skills necessary to make use of the materials?
- Does the course relate to the individual's life and work?
- Are there enough learners to make the programme work?

Problems of Relevance in Open and Distance Learning Programmes

In terms of relevance in open and distance learning, there are a number of problem areas.

Achieving a balance between economies of scale and meeting local needs

Open and distance learning courses need to function with large numbers if they are to achieve economies of scale. They also become cost-effective when their production is centralised and limited numbers of experts are used to teach large numbers of learners. By contrast, relevance needs to be addressed at more local levels, where smaller numbers of learners share common concerns, contexts and even languages.

Difficulties in the generation and dissemination of knowledge

Problems in the generation and dissemination of knowledge vary from country to country, and include:

- a lack of focus of professional activity or research base within the country itself instead of outside it;
- lack of an easy means to disseminate knowledge within the country;
- an unfavourable economics of publishing because of smaller numbers of potential purchasers;
- diversity of languages, often within one country;
- reproduction of out-of-date curricula as course materials by lecturers who have difficulty keeping up-to-date; and

- an exacerbation of these problems in open and distance learning, which can provide irrelevant materials more widely and effectively than conventional education.

The constantly changing nature of what is relevant

Needs change, as do technical and professional levels and cultural contexts. Rapidly changing needs can present problems for distance teaching programmes because of their large initial course production costs and their commitment to using existing stocks of materials, which may no longer be relevant to local or national needs.

2.3 Effectiveness

The point of trying to make open and distance learning relevant to the learners is to help make it effective, that is, able to achieve the objectives set for the project or programme.

How are we to judge the effectiveness of open and distance learning? Here are some useful *indicators of effectiveness* in an open and distance learning programme:

- the throughput of learners (important in terms of effectiveness and cost-effectiveness);
- the acceptability of the graduates or successful completers to employers or other educational institutions;
- its status in the eyes of the community;
- the quality of its materials and services;
- the extent to which the distance learning provision brings economic benefits to a country (for example, in initial training; retraining and upgrading; reaching rural areas; developing basic technical and vocational skills); and
- learner reactions to their learning experiences (since these can encourage or deter other potential learners).

Acceptability and credibility are of particular importance to distance educators, whose provision is often seen as 'second-rate'. How do we know when our programmes have become credible? Here are some possible indicators:

- acceptance of distance taught graduates by conventional universities for postgraduate work;
- acceptance of distance qualifications by employers;
- transferability of learners between the two kinds of institutions so that work already done in one is given equal credit in the other;
- recognition of teacher qualifications through open and distance learning for increments in salary similar to those for conventionally trained teachers;
- entry permitted to membership of professional bodies or to further professional training on the basis of the open and distance learning course or qualification;

- perception of value attributed by the public and by other professionals and academics; and
- use of the distance learning materials by other conventional institutions because they are the best available.

3. Some quality assurance tools

Here are five tools that can be useful in identifying and solving problems of quality, relevance, and effectiveness. They were developed by Bernadette Robinson for a workshop delivered by the International Extension College, and later published (Robinson 1994).

3.1 Tracking the source using the five whys

The first reason given for a failure of quality may not get to the heart of a problem, yet typically this is where most questioning stops at this point. The reasons need to be tracked back to source. One simple technique is to ask ‘why?’ five times (more if necessary) in answer to each response. This gets to a deeper level of understanding and analysis.

Example: The institution has a system of ‘second marking’ for all assignments submitted by students enrolled in its M.A. course. This means that part-time tutors mark an assignment and then send it to central office for second marking by a member of the full-time teaching staff before it is returned to the student. In one instance a full-time faculty member reduced the grade the tutor/first marker gave to an assignment by only one percentage point, without consulting the tutor. This upset the tutor, making her feel demeaned and incompetent.

Why did the faculty member do this?

Because she wanted to make it appear that she was more than a ‘rubber stamp’.

Why?

Because she came from a university system that does not routinely involve second marking, and did not understand the role of second marker.

Why?

Because this role had never been discussed with her or thoroughly explained.

Why?

Because the director of the programme took it for granted that all universities operated this way and that hence all faculty members would understand the role of second marker and the procedures they were to go through (for example, the obligation to discuss any differences of opinion with the first marker).

Why?

Because assuming something to be the case is easier than checking it out when one is exceedingly busy with this and other duties, including a great deal of travelling.

And so on.

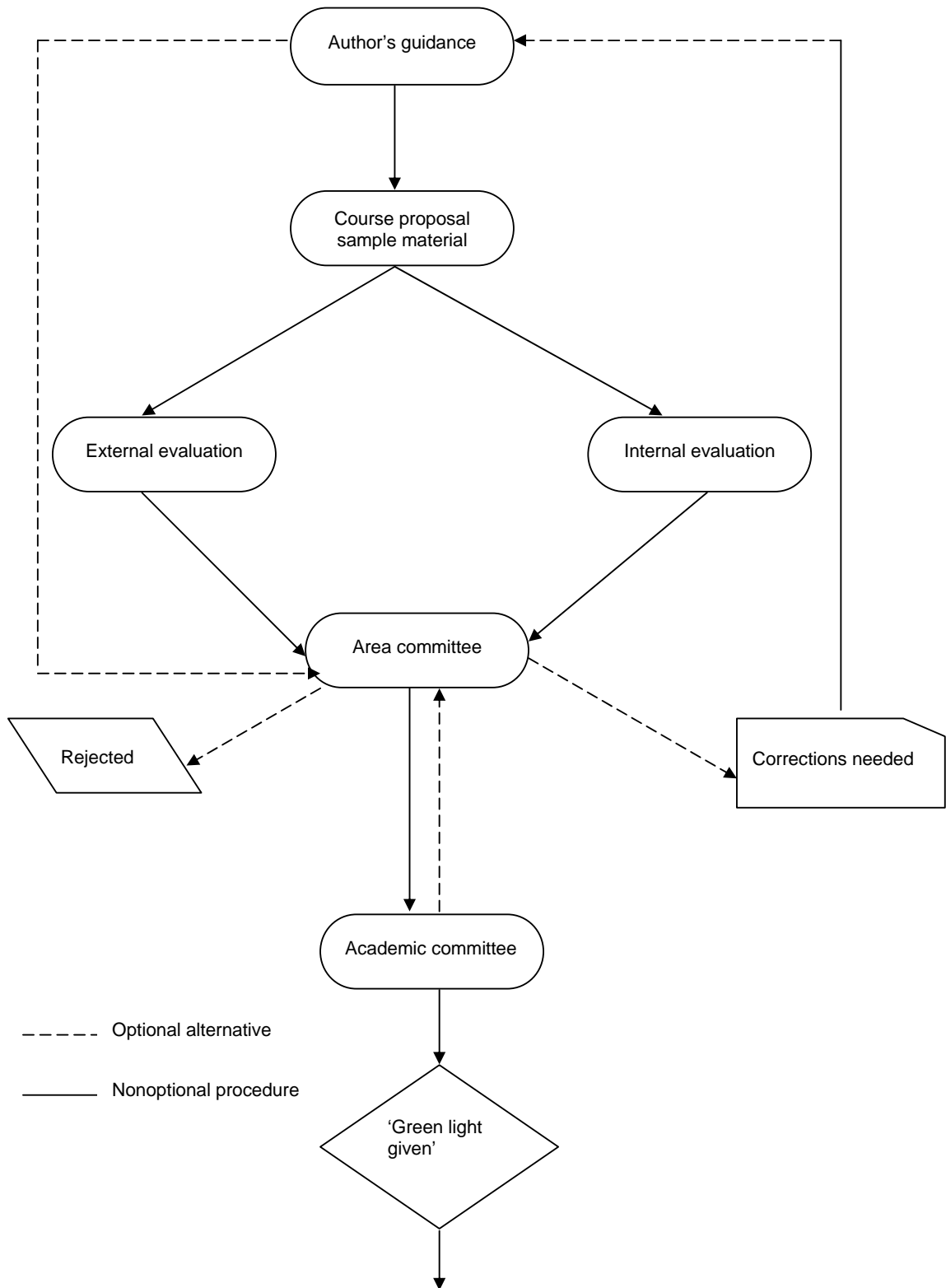
3.2 Flow diagrams

Flow diagrams are useful for mapping processes so they can be understood. Flow diagrams provide a way of tracking and displaying how quality is shaped through several stages or phases. As Robinson (1994:190) points out, flow diagrams are useful for:

- systematically recording steps, decisions, and activities required in a sequence;
- providing a clear diagrammatic representation of a process as a way of sharing information about what happens;
- identifying critical points or bottlenecks;
- displaying the consequences of planned change;
- standardising practice;
- training; and
- tracking and diagnosing the sources of failure.

The following flow diagram presents the process of course approval at the Open University of Israel (Guri-Rosenblit 1997:32).

A flow diagram: Course approval procedures at the Open University of Israel








3.3 Pareto analysis

An economist called Pareto is quoted by Robinson (1994:191) as suggesting that 80 percent of problems arise from 20 percent of causes. If you track the causes that create most failures of quality, you can concentrate your efforts on those areas that pay the most dividends. To apply this, you need to:

- identify the problems;
- try to quantify them; and
- use this information to make a simple bar chart which ranks the categories.

Example: An educational organisation tracks the nature of complaints received on a student ‘hot line’ from learners enrolled on their courses, categorises them, and records their frequency. The results of this tracking over the first month of classes are set out below. The fact that the top five complaints all relate to the bookstore operation gives managers a major clue as to where to focus their efforts in order to improve the quality of service to students.

A Pareto Analysis Bar Chart

Top Five Complaints	Frequency
	50 100 150 200 250 300 350
Set texts not available at start of course.	
Not enough set texts available for number of students in class.	
Hours of bookstore inconvenient for students who work part-time.	
Far too many set texts prescribed at too high a cost.	
No used-book sales scheme in place.	

3.4 Fishbone diagrams

A ‘fishbone’ diagram maps in a structured way:

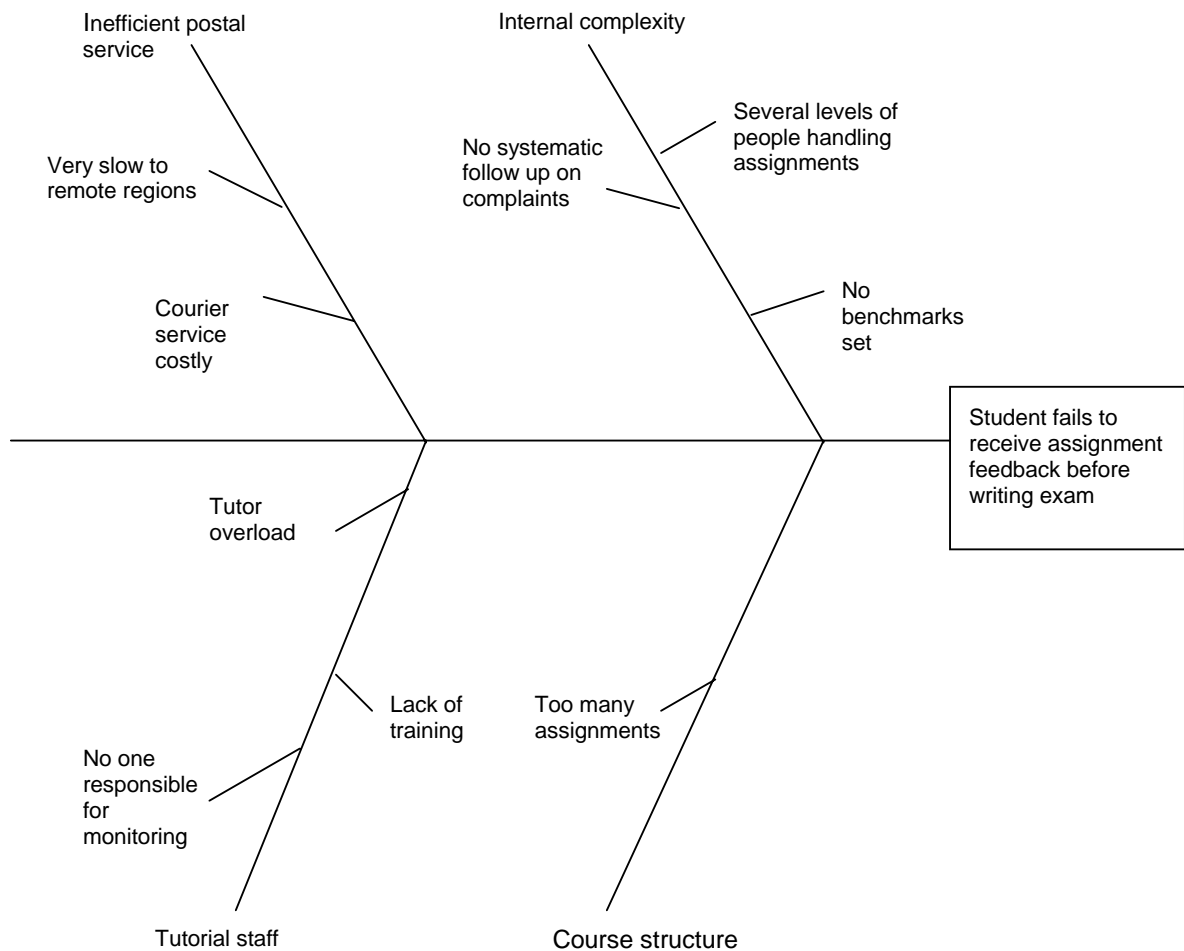
- the causes of a problem, both major and minor;
- the effects; and
- the factors involved.

It is useful in helping to diagnose and analyse problems with colleagues, especially when there is more than one cause. To use this you need to:

- identify the problem in a few words and put this as the head of the fishbone;
- identify the main issues or causes (four is a manageable number);
- under each of these four, explore the component factors or sub-causes (using a 'brainstorming' technique or the 'five whys');
- discuss the completed diagram, trying to distinguish between symptoms and causes; and
- agree on the one main cause and highlight it so that plans for remedies are focused on it.

Here is a sample fishbone diagram. The problem under discussion is put into the box at centre right.

A Fishbone Diagram



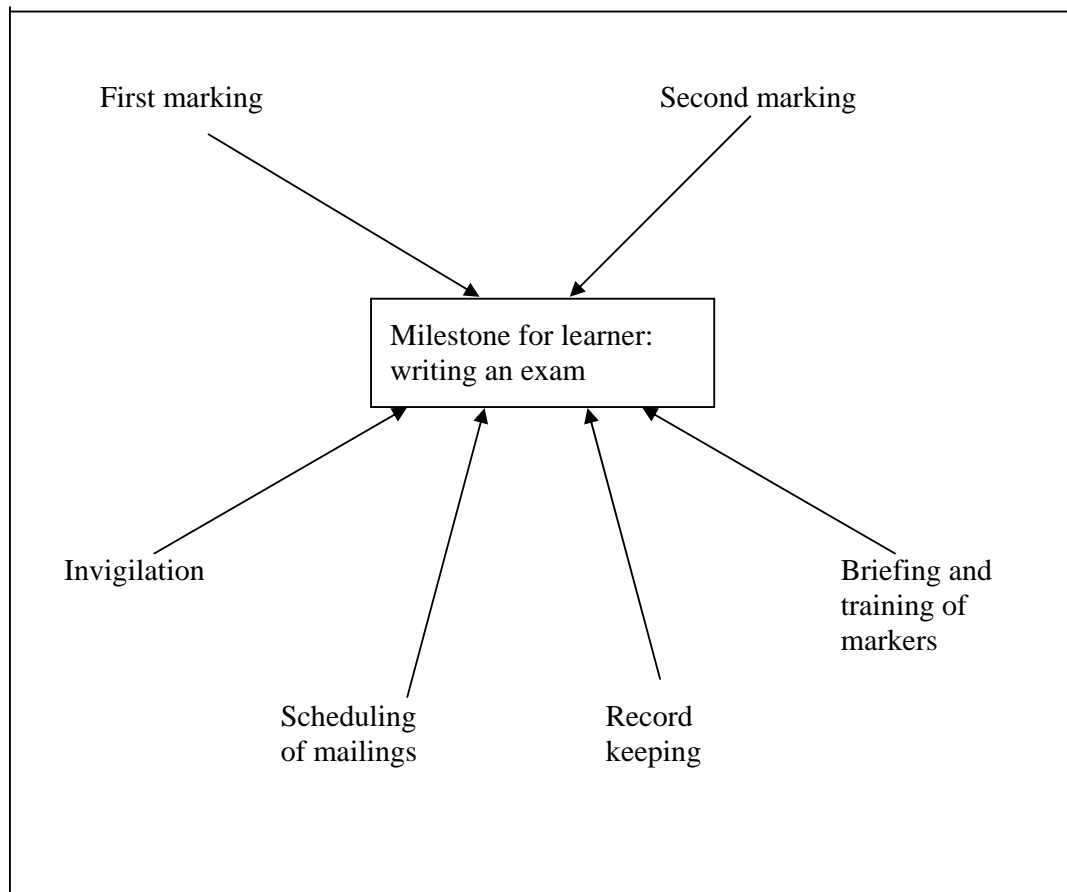
3.5 Milestones and barriers

This technique charts the learner's progress through the institution or programme to identify key milestones and barriers. Once identified, the processes that converge on these milestones and barriers are mapped and examined in detail. They are then reviewed and evaluated. This highlights critical points in systems, from the learner's point of view. The same can be done for other key players, for example,

- corporate clients;
- tutors; and
- support staff.

The points of hand-over or junction between stages or players are often critical barriers or milestones. Following is an example.

A Milestone Map



4. Performance indicators

4.1 Terminology

Distance educators increasingly are being required by their funding agencies, governments in particular, to develop sets of indicators by which institutional performance can be measured.

This exercise is closely tied to the process of *quality assurance*. Two important distinctions must be made between these processes, however:

- quality assurance is primarily focussed on quality, whereas performance indicators tend to focus on quantitative measures; and
- quality assurance tends to be primarily an internal activity, whereas performance indicators tend to be externally driven and mandated.

The term *performance indicator* is rather loosely and variously used. There is general agreement, however, that performance indicators, although based on the same data as management information, are clearly evaluative measures, clearly related to institutional or sector goals.

Here is a working definition:

Performance indicators provide a measurement for assessing the quantitative performance of a system.

Discussion: Again, you may wish to begin this discussion by drawing out participants' own definitions of what constitutes a 'performance indicator' and using those as a basis for what follows.

4.2 Audiences and purposes

There are many audiences for performance indicators, each with particular purposes and needs. Some of these audiences and their purposes are set out in the following table.

Discussion: You might wish to first draw out participants' ideas of who constitutes the audiences for performance indicators and the purpose these indicators serve, in the context of their own programmes.

Performance Indicators of Various Audiences

Audience	Purpose
Units and institutions	<ul style="list-style-type: none">• Internal management• Comparison with other units and institutions• Marketing, image building• Evaluation of teaching and research activities of individuals and departments
Government	<ul style="list-style-type: none">• Accountability• Policy and planning• Allocation of resources• Funding• Value of investment in research• Human resources planning
Public	<ul style="list-style-type: none">• Accountability
Learners	<ul style="list-style-type: none">• Institution choice
Industry	<ul style="list-style-type: none">• Research funding• Graduate employment
Research councils	<ul style="list-style-type: none">• Selective distribution of research funds

As you can see, the purpose of quality assurance exercises and the development of performance indicators overlap a great deal. But, again, the performance indicator exercise is most often performed in response to pressure from external agencies. Performance indicators become the object of controversy when they are used as a ranking device to allocate esteem and resources differentially.

4.3 Categories

A number of different approaches can be taken to the development of performance indicators that provide a basis for their categorisation. One common approach is based on a production model. Another is based on internal and external measures.

Discussion: What categories do your participants use now?

Measurement of input, process, and output

- *Input*: resources used (for example, financial and physical facilities, learners and staff);
- *Process*: management of teaching, research, and services; and
- *Output*: products of teaching, research, and services.

Internal, external, and operational indicators

- *Internal*: market share of undergraduate applications, and graduation rates;
- *External*: first destination of graduates, publications, and citations; and
- *Operational*: unit costs, staff-to-learner ratio.

4.4 Key programme indicators

The following table lists some key programme indicators that are used in these approaches.

Key Programme Indicators

Indicator	Purpose
Learner indicators	<ul style="list-style-type: none">• Population• Entry qualifications• Progression and completion rates• Destination• Learner satisfaction
Staff indicators	<ul style="list-style-type: none">• Qualifications (for example, staff with Ph.D.)• Gender balance• Age ratios• Academic-to-support staff ratios• Value of investment in research• Manpower planning
Resources and finance statistics indicators	<ul style="list-style-type: none">• Operating funds• Research funding• Other income

	<ul style="list-style-type: none"> • Staff-to-learner ratio • Expenditures on academic centres, central administration, and library • Different ratios of income-to-expenditure • Other selected financial ratios
Research indicators	<ul style="list-style-type: none"> • Number of research students • Research funding <ul style="list-style-type: none"> public sector research funding industry research funding total research income per academic staff member research expenditure per academic staff member ratios of research expenditure and income • Publications <ul style="list-style-type: none"> number of journal articles number of books other publications and conference papers • Patents and licences <ul style="list-style-type: none"> income earned
Estate management and physical resources indicators	<ul style="list-style-type: none"> • Space utilisation • Performance in maintenance, improvement, and capital expenditure

4.5 Characteristics of 'good' indicators

There is general agreement on the criteria for good indicators. They should be:

- relevant;
- can be updated;
- based on reliable figures;

- understandable; and
- valid, that is, measure what is supposed to be measured.

Indicators should be clearly related to the defined functions, objectives, and mission of the institution. Where there are common indicators across a system, however, different values might be put on low or high figures by different institutions, reflecting different objectives.

Example: High learner-to-staff ratios are desirable in open and distance learning, since one of the advantages of open and distance learning provision is its ability to make a relatively small number of teachers and other experts available to a wide population. Conventional institutions, however, may well pride themselves on low learner-to-staff ratios, as an indicator of small class sizes and hence a personalised and individualised approach to learners.

4.6 Concerns about performance indicators

There are also many concerns about performance indicators. Among these are:

- the costs of providing additional data when the data required cannot be extracted from existing information;
- an emphasis on one particular aspect of performance (e.g., financial performance) at the expense of others;
- the inappropriateness of trying to rank institutions on the basis of performance indicators when institutions have different objectives;
- the tendency to use performance indicators in isolation rather than in conjunction with measures using professional judgement such as peer review;
- the fear that diversity among higher education institutions might be lost as institutions seek to maximise performance on the same set of indicators;
- the imposition of indicators may be used as an instrument of control by government;
- the limited value of indicators in measuring ‘quality’ including the quality of teaching and learner outcomes; and
- the fear that the use of performance indicators will stress efficiency and economy rather than quality.

Discussion: What concerns do your participants have about the use of performance indicators in their programmes? What indicators of performance seem to be important to the institutions profiled in the case studies?

5. Practice exercise

5.1 A working example

Instructions: In order to bring the rather abstract nature of the material in this unit down to a working level, ask each of your participants for an example of an actual problem which they are encountering in their programmes. Ask for as concrete a problem as possible, such as chronically late dispatch of materials, or slow turnaround time on assignment marking.

One good way to elicit these problems is to have each participant write down their problem on a piece of paper; collect the papers, read out the problems, and group them in some way.

On the basis of this grouping, divide your participants into small groups. Give each group a problem to focus on. Ask each group to work together to produce answers to the following questions:

- How have you become aware of this problem?
- Track the problem back to its source. One way of doing this is to use the ‘Five Whys’: keep asking ‘Why?’ until you get to the root problem. For example:

Q: Why are materials being dispatched to students after the course has supposed to begin?

A: Because the course writers are not producing them on time.

Q: Why are the course writers not producing them on time?

A: Because they are working for us only part-time and do not take course writing as seriously as their full-time jobs.

Q: Why do they not take course writing as seriously as their full-time jobs?

A: Because course writing does not pay very well and does not earn them any prestige.

Q: Why does it not pay very well, and not earn them any prestige?

A: It doesn’t pay well because we don’t have the money to pay them what they think the work is worth, and is not prestigious because courses do not count as publications?

Q: How much would you have to pay them for them to take course writing seriously? And why do courses not count as publications?

And so on...

- Once you have identified the root problem, suggest ways in which you could solve it.
- Identify the resources you would require — for example, money, people, expertise — in order to put your solutions into action, and where you could get these resources.

Have each group report their results to the larger group, and discuss.

Timeframe: The small groups will need about three-quarters of an hour for their discussions. Therefore you can expect the overall exercise to take an hour and a half to complete.

Materials: Flipchart paper or overhead transparencies and pens for group reports.

TOPIC 10

Research and Evaluation

Overview

Source materials for this topic

Underlying issues in research

Commissioning and interpreting research

Research for system evaluation

Research for course evaluation

Management and research

A model

Applying research in practice

Quality assessment

Quality and the manager

Measuring effort, performance, and efficiency

An example of evaluating instruction

Practice exercise

Evaluating effort, performance, and efficiency

1. Overview

These materials support a discussion on the topic of the role research and evaluation play in the management of open and distance learning programmes. All educational programmes need to be informed by research. The emphasis here is on the particular ways in which research and evaluation can inform the work of managers of open and distance learning programmes.

1.1 Source materials for this topic

Calder, J. *Programme evaluation and quality*. London: Kogan Page, 1994.

Evans, T. (ed.) *Research in distance education*. Geelong: Deakin University Press, 1990.

Perraton, H. Theories, generalization, and practice in distance education. In *Open Learning*, 2:3, November 1987.

Schuemer, R. (ed.) *Evaluation concepts and practice in selected distance education institutions*. Hagen: ZIFF, 1991.

Thorpe, M. *Evaluating open and distance learning*. 2nd ed. Harlow: Longman, 1993.

2. Underlying issues in research

2.1 Commissioning and interpreting research

If we are to understand fully the outcomes of someone else's research project and make sound management decisions based on them, we need to know

- why a particular topic was chosen;
- who carried out the research;
- what research methods were employed; and
- how the results were reported.

When carrying out or commissioning research, we need to be aware of the choices we are making.

Research can be carried out in open and distance learning on a great variety of topics, for a number of different purposes, and at a number of levels. For example at the 'macro' level, one can evaluate an entire system; at the 'micro' level, one can evaluate a particular course offered within that system.

Discussion: What research is carried out in the participants' programmes? To what purposes? What references are made to research in the case studies that are part of this kit?

2.2 Research for System evaluation

The following kinds of research measures are typical of evaluation at the systems level:

- *basic measures of activity:* collection of basic management information on such issues as number of enrolled learners, number of courses on offer, cost of programme.
- *measures of efficiency:* how many learners successfully complete their courses, what workload they attempt, what level of learner throughput is, how cost-effective their programmes are compared with alternative forms of provision.
- *outcomes:* learner performance (exam results, standardized tests), use of materials by other institutions.
- *programme aims:* for example, have aims such as increasing access and equity been met by composition of learner body? is rural-urban distribution appropriate?
- *policy evaluation:* policy evaluation can be formative (e.g., market research), monitoring (e.g., surveys on impact of costs on learners), evaluation of policy changes, experiments or pilot studies.
- *organisational evaluation:* scrutinising the financial management and general organisation and methods, including monitoring tutors' marking patterns and turnaround time for assignments, evaluating course team approach to course preparation.

2.3 Research for course evaluation

The following kinds of measures are typically involved in evaluation at the level of a course:

- *formative evaluation*: draft materials can be circulated for comment from within and outside the organisation, or tried out on prospective learners (developmental testing).
- *summative evaluation*: intended to provide information about a course or materials in use; gathering feedback from learners on extent of utilisation, overall view of the teaching, general style of presentation, specific content issues.
- *cross-sectional studies*: study of a particular innovation or component used in a number of courses, aimed at drawing out generalisations from the use of a particular aspect of the teaching or to establish the effectiveness of a particular strategy or teaching medium.

3. Management and research

3.1 A model

The following activities, as we have seen, are typical of the tasks involved in the management function:

- planning;
- decision making;
- leadership;
- implementation; and
- evaluation.

These activities require information if the best possible decisions and choices are to be made at each stage. An example of a basic planning, research and evaluation model is outlined on the following page. 'Research' in this diagram includes 'evaluation' as one particular form of research that feeds into the overall management process.

3.2 Applying research in practice

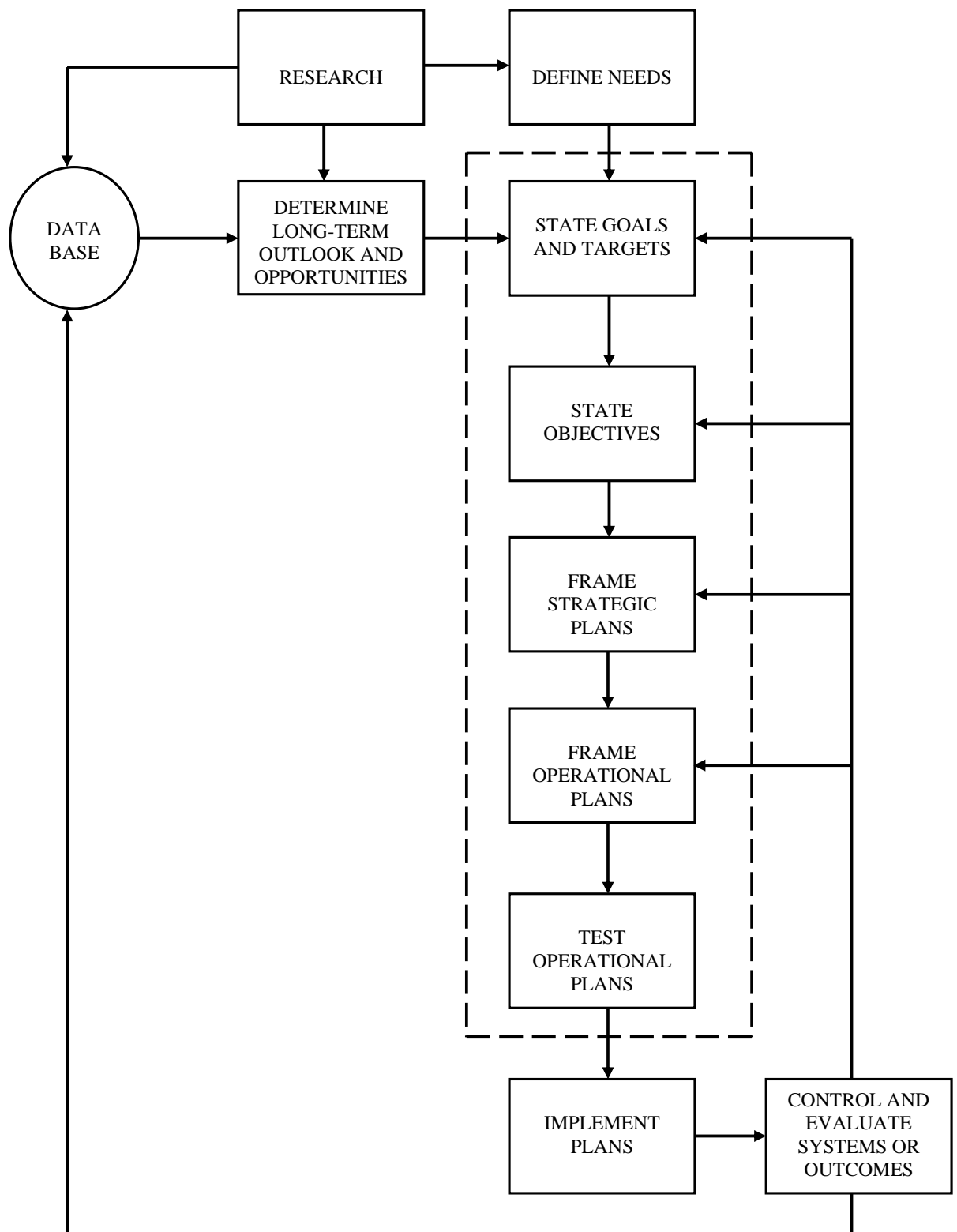
What is research for?

Discussion: You might want to ask your participants this question before launching into this discussion.

Research can contribute to improving open and distance learning practice in a number of ways, including:

- research for planning and accountability;
- research for good teaching and learning;

Basic planning, research and evaluation model



- impact evaluation; and
- understanding the world of open and distance learning.

For running open and distance learning organisations or units, research could be seen as falling into two main categories:

- research for the design and development of the system, including
 - the design of the structure of the institution; and
 - exploring market needs, including research for the strategic plan;
- research for day-to-day activities, involving formative evaluation of areas such as
 - correspondence tuition;
 - face-to-face tuition;
 - course materials;
 - learner progress; and
 - facilities;

and gathering baseline information such as

- number of enrolments;
- demographic data;
- completed assignments;
- examination attendance;
- pass rates; and
- number of dropouts.

Who are the researchers?

Discussion: You might want to ask your participants this question, in terms of their own programmes.

There are arguments for having evaluation done by researchers external to the institution because they will be more objective. There have also been arguments against using outside evaluators:

- they often have no experience of open and distance learning;
- they do not appreciate learner-centred approaches;
- they are unacquainted with the systems in place;
- they are unable to formulate appropriate questions; and
- they are not necessarily objective.

In many cases, however, institutions have no choice about external evaluation because of external funding or political and legislative decisions.

When is research to be undertaken?

Discussion: Again, a useful question to ask your participants before going on to present what follows.

There may be periods where organisations go into a steady state where little development and change occurs, which would include research.

The concern with research and evaluation and with innovative responses to environmental pressures may ebb and flow over a period of time rather than merely decline.

4. Quality assessment

4.1 Quality and the manager

An examination of quality issues is useful in clarifying questions of educational policy that arise in the manager's regular work. At the same time, a concern for quality is more likely to bring ideological questions into the open than to reduce decisions to the merely technical.

Examples:

Raising the quality and quantity of tutorials could be expected to raise the quality of an open institution's work in terms of process and performance. Because high-quality and high-quantity tutorials cost considerably more, however, they might or might not raise efficiency if this were measured in terms of cost per graduate. They might also have a negative affect on adequacy, since to cover costs the institution would have to raise its fees, thus making access more problematic and defeating the purpose of the institution.

Academic advisors may argue that the division between English language and English literature is artificial and anti-educational, and that a course which combines the two is more academically sound. But the performance many learners seek is not the widening of their understanding but a pass on the English language examination. This presents managers with a dilemma: should they stick with the academically sound, or go for a different definition of adequacy (i.e., meeting the demand for an examination pass), performance (passing in English language and never mind the broader aims of the English teachers) and process (back to the language exercises divorced from literature).

4.2 Measuring effort, performance, and efficiency

Research into various aspects of organisational performance can yield valuable information on the quality of that performance and pinpoint areas that need improvement. These aspects include effort, performance, efficiency, adequacy, and process.

Effort

Measuring effort can be quite important for the manager, especially where relevant data is available over long periods. But measuring effort is of value in assessing open and distance learning mainly as a source of data for measures of efficiency.

Performance

Two measures of internal efficiency have been widely used to examine performance:

- a measure of learning, often using examination pass rates as an indicator; and
- successful completion rate, which again may be of most value as giving data by which to examine efficiency.

Efficiency

Is distance teaching a cost-effective way of teaching, compared with conventional methods? Hilary Perraton has generated from existing research two generalizations by way of an answer (November 1987):

- if in a distance-teaching system the costs of face-to-face support rise to the level of those in conventional education, then the costs of distance teaching cannot compare favourably with those of the conventional system; and
- a favourable economic outcome for any one distance-teaching course is a function of three factors — the number of learners, the amount of face-to-face study and the sophistication of the media used.

What this emphasises is the need for three systems of analysis and the relation between them. As a guide to administrative planning it needs

- advice from the teaching system about the sophistication of the teaching media needed for a particular audience and subject, and about the role of face-to-face learning; and
- information from the assessment system about trade-offs such as that between the numbers to be reached and the amount of face-to-face learning permitted.

Adequacy

Is an educational programme adequate in relation to the educational needs it is addressing? The answers will depend on the political stance of the evaluator and the purpose for which the programme was designed.

Process

Is the process of education at a distance comparable with that of conventional education? Two problems here are that:

- *not much literature is available*: the issue is seldom directly addressed; and
- *points of comparison are few*: should open and distance learning be compared with the best of conventional education or with the average?

It is reasonable to compare the reality of conventional and open and distance learning if we assume that a learner might have a hypothetical choice between well run programmes taught in the two ways.

We also need to ask whether there are conditions necessary for the development of the capacity for dialogue which are absent from a programme of open and distance learning, or exceptionally difficult for it. Do the limited opportunities for debate for open and distance learning learners and the reliance that their courses unavoidable place on text necessarily disadvantage the learners?

4.3 An example of evaluating instruction

As we have seen in Topic 6, in distance education instruction tends to be carried by materials, using a variety of media, that have been designed to structure and facilitate learning as students work through them. A number of aspects of the process of designing, developing and delivering this instruction lend themselves to evaluation, the results of which can be very useful to managers in improving it quality.

The instructional design process

The following aspects of the process that is used to design learning materials make an appropriate focus for Quality Assurance evaluation:

- the planning process by which the materials were produced;
- the proposed aims, objectives and content of the materials being designed;
- the proposed teaching strategy; and
- the appropriateness and effectiveness of the media chosen for implementing the strategy.

Preliminary evaluation

All of these aspects might be examined before the students ever begin studying the materials. It can be valuable to have an outside 'expert' look over your materials before you make them available to students, paying attention to aspects such as academic credibility and likely effectiveness.

Academic credibility

You might want to ask some expert or experts in the subject matter questions such as the following about your open and distance learning materials.

Subject Matter Checklist for Learning Materials

- | |
|--|
| <ul style="list-style-type: none"><input type="checkbox"/> Are the aims and objectives sufficiently explicit?<input type="checkbox"/> Do the aims seem relevant to the needs of the target audiences?<input type="checkbox"/> Do the objectives support the aims?<input type="checkbox"/> Are there any additional aims and objectives we should include?<input type="checkbox"/> Is the content up-to-date?<input type="checkbox"/> Is the content accurate?<input type="checkbox"/> Are the content and presentation culturally appropriate? |
|--|

- Are there any important omissions?
- Do there seem to be any faults of emphasis?
- Are the assertions made adequately supported by evidence?
- Do the materials avoid oversimplification or overgeneralization?
- Are they true to the nature of the subject/discipline?
- Are they balanced, and at pains to present opposing points of view where appropriate?
- Are the media that have been selected being exploited appropriately and to their full potential?

Likely effectiveness

Here are some questions that can be asked regarding how educationally effective the materials are likely to be.

Checklist for Educational Effectiveness in Learning Materials

- Does the structure seem sensible and coherent, with introductions of previews, and summaries or reviews used where appropriate, and means available for allowing students with different needs to use the lesson in different ways?
- Are adequate steps taken to motivate the students and make clear to them what they are to do with the material and to get out of it?
- Are the materials pitched at the right level of difficulty and matched to assumed prerequisite skills and understandings of students?
- Is the tone that of a rigorous but friendly tutor, lively and interesting?
- Is the language plain and straightforward?
- Are analogies, examples, case studies and illustrations used where appropriate to develop understanding?
- Are questions, exercises, and activities properly integrated into the materials to encourage students in self-assessment and practice of relevant skills?
- Are print and electronic media effectively integrated?
- Is the form of presentation conducive to effective learning?
- Are students given sufficient information and practice of a kind likely to help them achieve the objectives?
- Is the relationship between assessment items and aims and objectives clear?
- Are assessment items clear in what they demand of students?
- Are assessment items likely to result in answers that can be marked with reasonable consensus of agreement among different markers?
- Is the likely student workload reasonable for the topic?

Discussion: A useful exercise at this point is to have sample course materials available for participants to assess against these checklists for appropriateness to their own contexts.

Developmental testing

Developmental testing involves trying out materials with students in the hope of developing or improving those materials for the benefit of other or future students.

Methods of developmental testing include:

- *tutorial tryouts:* trying the materials out on one student or a small group of students; and
- *field trials:* using larger numbers of students (20-30) in circumstances as similar as possible to those in which your eventual students will work.

Continuous monitoring

Once the learning materials are in delivery, you will want to ‘keep an eye on things’ to see what problem areas need addressing, good things that are emerging and should be enhanced, and prepare for end-of-course evaluation.

Mechanisms available for this kind of formative evaluation include:

- *a course log book:* used to record the main things you notice in the running of the course and the main in-course corrections you have used;
- *casual evaluation:* appraising what is happening in day-to-day situations and responding to it; and
- *deliberate evaluation:* actively seeking specific kinds of information, through discussions and interviews, questionnaires.

Summative evaluation

When the course is completed, a summative evaluation of its effectiveness addresses questions such as in the following checklist.

Checklist for the Summative Evaluation of the Effectiveness of Learning Materials

- Did the course attract enough students?
- Were they sufficiently qualified?
- Did enough of them last the course?
- Was the standard high enough?
- Was the course cost-effective?
- Were the students satisfied?
- Were other stakeholders satisfied?
- What needs to be changed?

Typical instruments and sources for obtaining this information include:

- *questionnaires*: for students, for tutors, for others involved in delivery; and
- *interviews*: with selected students, with tutors, with others involved in delivery.

The results of these evaluations can then be fed back into the design process as a basis for improvements to both the process and the results.

5. Practice exercise

5.1 Evaluating effort, performance, and efficiency

Instructions: Divide participants into three working groups. Assign each group the task of finding indicators one might use in assessing the following criteria of quality in an open and distance learning programme: effort, performance, and efficiency (e.g., exam results, enrolments). To complicate matters further, ask each group to consider these criteria in terms of formal education programmes (those which lead to credentials) and non-formal education programmes (those which do not lead to credentials). Allow a half hour for small group discussion and then have each group share their findings with the group as a whole.

Timeframe: Approximately one hour.

Materials: Flipchart paper and pens.

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Glossary of Open and Distance Learning

Access centres: see **learning centres**.

Accountability: holding operating personnel responsible for the estimated costs in their budgets and for expenditures.

Accounts payable: the money you owe to providers of services or products.

Accounts receivable: the money owed to you for services rendered or products sold.

Action verbs: in writing learning objectives, verbs that state expectations of learner behaviour as an action to be performed, which learners and teachers can evaluate as having been performed.

Activities approach: a way of designing learning materials that provides a series of activities to help learners master content, on the assumption that learners will only learn if they actively engage with the material presented.

Administrator: the person who carries out administrative duties on behalf of the development team, liaises with contract writers, assists with copyright clearance, compiles readings and illustrations, ensures production schedules are met, and controls the day-to-day progress of the course.

Adult education: teaching and learning that emphasises the principles of adult learning, often known as **andragogy**, as compared to **pedagogy**, or child-centred learning.

Advance organisers: paragraphs at the beginning of a unit or lesson that are intended to remind learners of what they have already learned, to connect it with what they will learn in this lesson.

Affective domain: in teaching and learning contexts, the domain field of activities relating to feelings or emotions.

Aim: in the context of teaching and learning, a broad, general statement of either what the learner might learn or what the teacher will do.

Analysis: a level of learning that involves breaking down material into its meaningful parts so that the relationship among the parts can be determined.

Analytical approach: an approach to designing a curriculum, for example, which examines the components of that curriculum — such as the learning objectives, key concepts, or the competencies that are desired as outcomes — and organises the curriculum around them.

Ancillary operations: activities that fall outside the core activities of an organisation.

Andragogy: see **adult education**.

Application: a level of learning that involves using knowledge in concrete situations.

Apportioning: the act of assigning fractions of the cost of a shared facility or service to cost centres.

Assessment: the measurement of a learner's performance in terms of knowledge, skills, and attitudes.

Asynchronous: see **networked learning**.

Audio conference: a technological arrangement in which telephones or speakerphones are connected so that people in three or more places can talk to one another.

Audiographic conference: a technological arrangement in which audio conferencing is supplemented by devices that send text or still pictures, such as computers, electronic whiteboards, graphics tablets, and light pens for writing to computer screens, tablets, and whiteboards.

Basic education: the provision of teaching and learning opportunities that enable learners to obtain primary-level skills in reading, writing, and numeracy, so that they can participate fully in society.

Behavioural objectives: learning objectives that indicate the expected changes of behaviour in learners who complete a course of instruction.

Bimodal institution: see **dual-mode institution**.

Broadcast: any transmitted radio or television programme.

Budgeting: a process consisting of a series of steps by which estimates of revenue and expenses and related statistical data are used to compile a plan for expenditure for the next financial period.

Bulletin board system: a small computer system that allows members to exchange messages, maintain discussion groups, and download software.

Cable feed: broadcast material sent via a fixed cable or a community antenna.

Capital budget: money set aside on a recurring basis to meet capital expenditure.

Capital cost: expenditure on the acquisition of fixed assets (land, buildings, machinery, equipment), in which the expenditure is intended to benefit more than one accounting period.

CD-ROM (compact disc–read only memory): a disc that can store a large amount of text, audio, video, and graphic information; a computer needs a special drive and software to display these materials.

Cloze test: a test of reading and comprehension skill that involves the insertion or deletion of appropriate words in a text.

Co-production: the joint production of a course or courses by two or more institutions.

Cognitive domain: in the context of teaching and learning, the domain of learning activities that relate to perceiving the world and knowing about it or understanding it; this domain contains six levels: knowledge, comprehension, application, analysis, synthesis, and evaluation.

Comprehension: a level of learning that involves grasping the meaning of material or restating previously learned material in one's own words.

Computer-assisted learning (CAL): a learning method that uses a computer system to present individualised instructional material.

Computer-based learning (CBL): a generic term for the various kinds of stand-alone (that is, non-networked) learning applications that involve computer software.

Computer conferencing: the use of a central computer to receive, hold, and distribute messages among participants' computers.

Computer-marked assignments: assignments that are scored by computer using optical scanners.

Computer-mediated communication (CMC): in the context of teaching and learning, the use of electronic mail, computer conferencing, and the World Wide Web to deliver learning material and provide learners and teachers with opportunities for interaction; learning via CMC is also called '**networked learning**'.

Condition statements: parts of a learning objective that describe the conditions under which the performance required is to take place, such as 'without supervision' or 'using a calculator'.

Consortium: an arrangement involving a number of organisations in formal partnership, with joint allocation of resources and sometimes an independent managing agent; for example, open and distance learning institutions that set up formal agreements may involve co-production of elements of a course, complete joint course production, joint learner enrolments, or cross accreditation and credit transfer.

Constructivist: frameworks for learning in which learners and teachers work together to construct meanings, rather than having these meanings pre-determined or prescribed in advance for the learner by the teacher.

Continuing education: education that is usually not for credit, but which can be delivered on campus or at a distance.

Copyright: a set of rights granted to an author under the national law on copyright.

Correspondence education: education that relies on print-based, self-study materials with communication through postal services.

Cost: the amount of actual or notional expenditure of money incurred on, or attributed to, a specific object or activity.

Cost-benefit analysis: a systematic comparison of the cost of carrying out the project, with the value of the resulting service, resource, information, or product to any of a possible range of beneficiaries.

Cost centres: the locations, functions, items of equipment, or departments to which costs are attributed; for example, a particular degree programme may be identified as a cost centre within an institution.

Cost unit: a measured amount of a product or service used for the expression of the costs of that product or service.

Counselling: the provision of personal and emotional support to learners.

Course blueprint: a course planning document, containing details of the content, components, and costing of a course that is proposed for development.

Course transfer: the sale, lease, or gift to one institution of a course produced by another institution.

Course writer: the person on the course team who possesses both expertise in the subject matter of the course and the ability to write in a way that communicates effectively with learners at a distance.

Criterion-referenced assessment: the evaluation of a learner's performance in relation to a given standard rather than in relation to the performance of a reference group.

Curriculum: the total structure of knowledge and skills and educational experiences that make up any one educational system or its component parts.

Curriculum planning: the global term applied to any systematic process intended to develop the structure of a **curriculum**.

Database: a collection of data fundamental to an operation, organised in some pre-defined structure; typically held on computer.

Deep learning: an intention on the part of the learner to develop his or her understanding and to challenge ideas; contrast **surface learning**.

Desktop publishing (DTP): the production of printed text using a 'desktop' or personal computer system.

Developmental testing: trying out materials with learners in the hope of developing or improving those materials for the benefit of other or future learners.

Digital: information stored in the form of 0s and 1s; digital information may include video, audio, graphics, and text.

Direct cost: a cost that can be identified with a particular product or service and not with others; these normally comprise the cost of materials, labour, and of expenses directly incurred on the product or service.

Discounted cash flow: the return desired at some time in the future for a payment made now.

Dispatcher: the person who bears responsibility for dispatching materials to the learner in a timely fashion, maintaining inventory and warehousing, and keeping records.

Distance teaching: a term that emphasises the teacher's role in the distance education system.

Distributed learning: a term that emphasises learning rather than the technology used or the separation between teacher and learner; distributed learning makes learning possible beyond the classroom and, when combined with classroom modes, becomes **flexible learning**.

Dual-mode institution: also called **bimodal**; an institution that offers learning opportunities in two modes: one using traditional classroom-based methods, the other using distance methods; the same courses may be offered in both modes, with common examinations, but the two types of learner — on-campus and external — are regarded as distinct.

Editor: the person on the course team who bears responsibility for the clarity and accuracy of the language and the textual presentation of the materials, much as in a traditional publishing house.

Effectiveness: the ability to achieve the objectives set for a project or programme.

Electronic mail (e-mail): the exchange of information from one computer to another using software that is designed to store and forward messages received or sent.

Evaluation: a level of learning that involves judging the value of the material with reference to a specific set of criteria.

External studies: instruction that takes place somewhere other than a central campus, such as a classroom remote from campus, and that includes a variety of delivery options, including home-study and telecommunications.

Feedback: in the context of teaching and learning, the response to or comment on a learner's performance that the learner can use to understand more clearly and improve his or her performance.

Field trials: also called **pilots**; a method of developmental testing learning materials that uses relatively large numbers of learners (20 to 30) in circumstances as similar as possible to those in which eventual learners will work.

Financial year: the year over which costs are measured.

Fixed costs: operating costs that are unaffected by variations in volumes of output; this does not mean that they do not vary over time in response to other cost factors (for example, price increases).

Flexible learning: a term that emphasises the creation of environments for learning that have the following characteristics: convergence of open and distance learning methods, media, and classroom strategies; learner-centred philosophy; recognition of diversity in learning styles and in learners' needs; recognition of the importance of equity in curriculum and pedagogy; use of a variety of learning resources and media; fostering of lifelong learning habits and skills in learners and staff.

Fog index: an index of readability based on a formula that involves the average number of words in a sentence and the average number of syllables per word; basically, the longer the words and the sentences, the 'foggier' or less readable the text.

Formal assessment: the evaluation of learning that is carried out using scheduled assignments or examinations, on which the learner's performance is graded.

Formative assessment: the evaluation of learning that is carried out as the learning activities progress; contrast **summative assessment**, which takes place upon completion of the activities.

Formative evaluation: the assessment of learning that occurs as a project or course is in progress, with the aim of identifying problems and addressing them immediately; contrast **summative evaluation**.

Free-standing institution: see **single-mode institution**.

Full absorption costing: a method of costing used for some purposes — for example, to support pricing decisions and to derive performance measures — but not required for other purposes, as when one is looking at the effect of changes in the volume of output; ask the question, ‘Am I looking at costs as they are now (full absorption costing) or am I seeking to examine the effect on costs of profitability of a change in volume costs (marginal costing)’?

Graphic devices: items in a text design that are used to emphasise a point, direct the reader’s attention, highlight the relationship between ideas, or provide learners with cues as to the activity in which they should be engaged; for example, tables, charts, symbols, shading, borders, textures, and different fonts.

Handbooks: the part of the learning materials package that provides information to learners about other materials (for example, video cassettes) that have been purchased or leased from another institution but that need some explanatory notes so that they fit into the context of the user institution.

Home study: a mode of learning that does not require the learner to leave home in order to study.

House style: a set of guidelines to writers, editors, and visual designers that specify the typefaces to be used; type size; length of lines; size of margins; use of bold, italic, and other variants of the typefaces; treatment of headings, subheadings, footnotes, and so on; position of illustrations and captions in relation to the text; and editing and reference style.

Hypertext mark-up language (HTML): the protocol used to create documents for publication and distribution on the World Wide Web; HTML consists of tags, added to text documents, which format and create links to other WWW resources.

Icon: a visual symbol that resembles the thing it represents, used in learning materials as a signpost or indication to learners that they are to undertake a particular activity; for example, a stylised pencil might be used to indicate to learners that they are to write the answer to a question, or a stylised book might indicate they are to turn to the reading indicated.

Incremental cost: the additional cost arising from an increase in more than one unit of output.

Independent study: a mode of learning in which learners work through their study materials independently of other learners.

Indirect cost: a cost that cannot be identified with any particular product or service, but must be shared over a number of products or services because it is common to or jointly incurred by them.

Informal assessment: assessment of learning that is carried out using discussion with tutors or peers, self-tests, and so on, in which the learner’s performance may be noted but not formally graded.

Information highway: a term developed as a way of describing the joining together of once-separate telephone and television technologies and computing systems into a single global network of networks.

Instructional design: see **instructional development**.

Instructional designer: the person on the course team who understands research in open and distance learning and adult pedagogy, is the collector of wisdom and successful techniques in open and distance learning, and is able to apply this knowledge to the course in question without clashing with the course writer or writers.

Instructional development: also known as **instructional design**; a process of designing instruction in a way that enables learners to learn effectively.

Interaction: two-way communication between tutor and learner, between learners, and between learners and the learning materials.

Interactive radio instruction (IRI): a system of educational radio broadcasts, intended for reinforcing learning in classroom settings, which contain instructions to teachers and learners to engage in some activity related to the broadcast and to actively respond to what they are hearing.

Interactive television: television broadcasts that are combined with some form of telecommunications link to enable viewers to respond to what they are watching.

Interactive textbooks: course books that are created anew, from the ground up, using a dialogue approach that incorporates a great many activities in which the learner may engage.

Interactivity: the ability for the learner to respond in some way to the learning material and obtain feedback on the response; there are two kinds of interactivity: (1) *learning material interactivity*, involving the learners' interaction with the medium, the level, and the immediacy of feedback the medium itself provides, and the extent to which the medium will accommodate learners' own input and direction; and (2) *social interactivity*, the extent to which learners interact with teachers and with each other via a given medium.

Internet: the worldwide collection of computer networks that use a common communications protocol and addressing scheme to share resources with one another; owned by no one, it is maintained collectively by the individual national, regional, commercial, and institutional networks that make up the Internet; it is a learning, information, and business tool.

Intuitive approach: a way of designing curriculum, for example, which relies on one's own experience of and feelings toward the subject, and hence is relatively informal, unstructured, and non-systematic.

Inventory: the stock kept on hand.

ISDN cable: Integrated Services Digital Network cable, allows linkage for video conferencing.

Knowledge: a level of learning activities that involves recalling previously learned material.

Learner-centred education: an educational philosophy in which the integrity and freedom of the individual is primary; therefore, the teaching and learning process provides flexible sequences of study, negotiated objectives and content, negotiated learning methods, negotiated methods of assessment, and a choice of support mechanisms.

Learning centres: sometimes called **access centres** or **regional centres**; offices or buildings maintained by open and distance learning programmes in order to provide localised delivery of learning materials and support to learners.

Lifelong learning: a philosophical concept in which learning is viewed as a long-term process beginning at birth and lasting throughout life; a conceptual framework within which the learning needs of people of all ages and educational and occupational levels may be met, regardless of their circumstances.

Listserv: an e-mail system that automatically sends messages to all subscribers on specific mailing lists, especially interest groups.

Marginal cost: the additional cost of an increase of one unit of output (for example, one additional open and distance learning centre).

Marginal costing: see **full absorption costing**.

Market elasticity: the extent to which the price of a product can be increased without reducing the market for the product.

Media designer: sometimes called the **visual designer**; the person on the course team who bears responsibility for the illustrations, page layout, formatting, and integration of print with other media.

Mediated education: see **technology-based education**.

Merger: the creation of a new entity out of previously independent entities.

Mixed mode institution: an institution that offers learners a wide choice of modes of study, including independent, group-based, face-to-face, mediated, or some combination; mixed mode institutions maximise the flexibility of place and pace of study, and are the result of the convergence of face-to-face and distance modes of study.

Multimedia: learning technologies that involve the whole range of audio, visual, text, and graphics media available, integrated into a package that has been effectively designed from an instructional point of view.

Needs analysis: a process for identifying the learning and training needs of a particular group or population.

Networked learning: a type of learning in which learners and instructors use computers to exchange messages, engage in dialogue, and access resources; the interaction can occur in real-time (**synchronously**) when learners and instructors are communicating at the same time from different places, or in delayed-time (**asynchronously**) when they are not linked at the same time.

Networking: the process of creating, expanding, and maintaining relationships with other agencies.

Non-formal education: education that takes place outside the formal education system on either a regular or an intermittent basis.

Non-recurrent costs: see **one-time costs**.

Norm-referenced assessment: assessment of learning that is based on the learner's performance in a given area in relation to that of some norm or reference group.

Objective: in the context of teaching and learning, a specific statement about what the learner will be able to do when a learning activity is complete, the conditions under which learners will demonstrate their competency, and the way in which this competency will be measured.

Objective assessment: evaluation that is designed as far as possible to exclude the learner's subjectivity; grading is done by presenting a number of factual questions to be answered by one word or a check mark instead of using verbal expression and the organisation of material, requiring a minimum of judgment on the part of the marker.

One-time costs: also called **non-recurrent** costs; costs that do not recur year after year; for example, equipment purchases.

Open access: a way of providing learning opportunities that implies a lack of formal entry requirements, prerequisite credentials, or an entrance examination.

Open and distance learning: a way of providing learning opportunities that is characterised by the separation of teacher and learner in time or place, or both time and place; learning that is certified in some way by an institution or agency; the use of a variety of media, including print and electronic; two-way communications that allow learners and tutors to interact; the possibility of occasional face-to-face meetings; and a specialised division of labour in the production and delivery of courses.

Open learning: an educational philosophy that also emphasises giving learners choices about media, place of study, pace of study, support mechanisms, and entry and exit points.

Operating cost: see **revenue cost**.

Opportunity costs: the notional costs, difficult to quantify, of undertaking one activity rather than another; for example, the project team and other staff involved, as well as materials and equipment, could all have been used in different ways to benefit the institution during the project period.

Overhead cost: the sum of all the indirect costs of a cost centre or cost unit; for example, the cost of a shared telephone exchange, central computer, and utilities.

Pay-back period of return: the length of time it will take to pay back the original investment of staff salaries and other costs.

Pedagogy: child-centred learning.

Peer assessment: a type of assessment of one learner's performance carried on by other learners.

Performance: the part of a learning objective that states what the learner should be able to do as an outcome of a learning process.

Performance indicators: measures for assessing the quantitative performance of a system.

Period of account: the period of time over which costs are measured.

Pilots: see **field trials**.

Post-tests: tests given to learners after they complete a lesson, module, or course, to assess what they have learned; contrast **pre-test**.

Pre-tests: tests given to learners before they begin a lesson, module, or course; they serve two purposes: to check that the learner has the necessary prior knowledge, skills, and perhaps attitudes to undertake the course; and to compare the results obtained with those obtained in subsequent post-tests to establish how much the learner has learned; contrast **post-test**.

Printer: the person who oversees the physical reproduction of learning materials, including collating, binding, and packaging.

Printing: the actual manufacture of printed distance learning materials; the industrial process or processes required to put the production manager's requirements into their final physical form.

Process costing: a method of costing by which expenditures are accumulated into costs of production and allocated to units of the product.

Production: the overall process of taking a manuscript and managing it through to printed, finished copies.

Project costing: a method of costing used when the manufacturing process is not continuous, but is a series of large, special-order contracts.

Psychomotor domain: in the context of teaching and learning, the domain of learning activities that deal with learning physical skills; normally associated with vocational training.

Quality: the fitness for purpose of a product or service according to a set of required standards.

Quality assurance (QA): an approach to organising work that: ensures the institution's mission and aims are clear and known to all; ensures the systems through which work will be done are well thought out, foolproof, and communicated to everyone; ensures everyone's responsibilities are clear and understood; defines and documents the institution's sense of 'quality'; sets in place systems to check that everything is working to plan; and when things go wrong — and they will — there are agreed ways of putting them right.

Quantitative analysis: the process of identifying the discrete components of some phenomenon and the relationships that obtain between them, emphasising entities that can be counted or measured.

Rate of return: the percentage return on the investment.

Recurrent costs: costs that recur year after year (or period of account after period of account).

Regional centres: see **learning centres**.

Relevant range: the range of activities within which fixed operating costs are set.

Revenue cost: also called an **operating cost**; expenditure that is expected to benefit only the current period.

Satellite feed: broadcast material sent via a satellite that is orbiting the earth.

Self-assessment: a type of assessment carried on by the learner him or herself.

Self-contained: a course that contains all the subject material as well as the features of self-instructional courses; to produce a self-contained course one writes everything that would be included in a textbook as well as all the activities and so on that would turn it into a tutorial in print.

Self-instruction: a process in which materials take learners step-by-step through an instructional process; self-assessment exercises are a central feature, and instruction can be paper-based or computer-based.

Single-mode institution: an institution that has been set up solely to offer programmes of study at a distance.

Stakeholders: groups or sometimes individuals who have a significant interest in the successful outcome of some initiative or activity; in the case of an educational institution, stakeholders can include funding agencies, employers of those who eventually graduate, the staff of the institution, and existing and potential learners.

Standards: the parts of a learning objective that describe how well the learner will be expected to perform, expressed in terms of accuracy, speed, or quality.

Stepped fixed cost: a cost that varies with the level of activity, but only has a number of possible values, each of which applies over a relevant range.

Study guides: the part of learning materials that are used in conjunction with collections of articles, textbooks, audio cassettes, video cassettes, and broadcast programmes; they are more substantial than handbooks but less labour intensive than interactive textbooks; they are probably the most commonly produced print materials for course packages.

Subjective assessment: evaluation designed to take into account the learner's own thoughts, feelings, and experiences and ability to express them, rather than factual knowledge alone.

Summative assessment: evaluation of learning that takes place on completion of the learning activity or activities.

Summative evaluation: assessment that occurs at the completion of a course or project, which provides a summary account of its effectiveness and the extent to which it met its goals and objectives; contrast **formative evaluation**.

Surface learning: an intention on the part of the learner to memorise information and to follow instructions rather than to understand and challenge; contrast **deep learning**.

Synchronous: see **networked learning**.

Synthesis: a level of learning activities that involves combining parts to form a new whole.

Systems approach: an approach to organising the tasks required to accomplish one's goals, which sets the conditions for proceeding in an orderly way; a systems approach recognises that all the components of the system are interrelated, so that a change in one component will bring about changes in the others.

Task analysis: the process that identifies the skills and knowledge a competent person needs to complete a task to ensure that they are included in the learning process.

Technical or vocational training: training that is designed to prepare technicians, middle management, and other skilled personnel for one or a group of occupations, trades, or jobs.

Technology-based education: in the context of teaching and learning, a system in which a media other than print has a major role.

Telephone tutoring: the use of the telephone for providing academic help to learners, either one-on-one or in groups (see **audio conference**).

Tendering: the process of calling for bids on a project or supply of products or services.

Total cost: the sum of all the costs attributed to some specific object or activity.

Tutor-marked assignments: assignments marked by the learner's tutor.

Tutorial tryouts: a method of developmental testing that involves testing the materials with one learner or a small group of learners.

Tutoring: the provision of academic assistance to learners in two major forms: (1) stand-alone (for example, computer-assisted learning (CAL), and computer-managed learning (CML)) and (2) conferenced (video, audio, or computer).

Two-way instructional radio: radio broadcasts for educational purposes that are combined with some form of telecommunications or that use two-way radio links to enable learners to interact with teachers and other learners.

Variable costs: costs that vary with volume of output.

Variiances: measures of financial performance derived by comparing actual expenses to original budget plans.

Video conference: a technological arrangement in which television monitors, cameras, and microphones are linked so that people in three or more sites can all see, hear, and speak to one another.

Video disc: a disc on which video and audio signals are recorded for television use; a video disc requires a video player compatible with the video disc.

Visual designer: see **media designer**.

World Wide Web (www): a communication protocol of the Internet that deals with text, audio, video, animation, graphics, and colour — anything that a computer programme can produce.

Deakin University

Prepared by:

Jocelyn Calvert

Brief description of the programme

Located in the State of Victoria, Australia, Deakin University is a multi-campus institution with a major commitment to flexible learning delivered through the use of educational and communications technologies. Headquartered in Geelong, the university operates three campuses in Melbourne, two in Geelong, and one in Warrnambool.

Deakin enrolled 30,191 students in its regular programmes in 1996. A further 30,000 students were enrolled through its commercial arm, Deakin Australia, for a total in excess of 60,000 students. Of the regular students, 13,088 or 43 percent were enrolled off-campus. All Deakin Australia students were off-campus students, making Deakin, with a total of more than 43,000 off-campus students, the largest university off-campus provider in Australia.

Problems encountered

Planning and managing distance education

- The major planning and management issue facing the university over the past six years has been how to integrate the academic programmes and approaches to teaching and learning of the three formerly independent degree granting institutions that merged in the period 1990 to 1992 to form the present Deakin University. Two of these institutions had major pre-merger distance education programmes.

Implementing quality assurance

- The university is committed to the principles of quality management and continuous improvement. Implementing these principles involves both the regular evaluation of teaching materials and the assessment of teaching of academic staff, both of which involve seeking student reactions to their course experience. It has proved difficult to distinguish between student reactions to learning materials and to the performance of teaching staff. The distinction is important because the corrective actions that are needed are very different in each case.

Using and integrating media in distance learning

- The development of the World Wide Web allows Deakin to deliver off-campus programmes in new ways. Used well, the Web provides an easy-to-use, cost-effective, flexible, and powerful medium for the delivery of higher education. Its ease of use, however, presents the university with a serious issue. Academic staff

can quickly learn to ‘mount’ Web courses. They are not always, however, well equipped to take best educational advantage of what the Web offers. The issue facing the university is how, on the one hand, to ensure that all Deakin-based Web offerings reflect university standards and policies, while, on the other hand, allowing academic staff to creatively explore the Web for educational purposes.

- Similarly, a broader issue facing the university is how to develop the skills of teaching staff so that they are able to make the best educational use of new educational media. The increasing reliance of the university on resource-based learning methods has fundamentally changed the nature of academic work in the university with considerable implications for the nature of professional development activities.

Instructional design and production for distance learning

A major issue facing the university is how to cost-effectively maintain an up-to-date archive of all its course materials. Over the last two years, staff have been involved in the development of an ‘electronic warehouse’ of materials. The concept is that all materials will be stored digitally, allowing for both easy revision and reproduction in whichever medium is required.

Another important issue is how to allocate scarce educational development resources for maximum benefit. Should the university allocate significant resources to ‘lighthouse’ projects designed to illuminate and illustrate the art of the possible? Or would it be better to allocate resources more widely to projects that make use of mainstream approaches? This issue is unresolved.

Learner support systems

An important challenge is how to foster the effective use of electronic media for teaching and learning. Many staff and students are new to the educational use of e-mail, bulletin boards, and computer conferencing. Their effective use requires the development of new skills and a willingness, in the case of students, to participate.

Part of the process of higher education is the integration of students into a broader, often discipline-based, academic community of students and scholars. The development of such a community is problematic in distance education programmes such as those at Deakin University, which often do not require students to engage in on-campus or face-to-face activities. Deakin’s response has been to use communication technologies to create electronic communities. The members of this community — academic staff, students, academic support staff, and administrative staff — are linked through an integrated, interactive, electronic communication environment known as the *Deakin Interchange*. The Interchange provides users with access to e-mail, computer conferencing, library and administrative databases and services, and Web services through the use of a consistent, menu-driven, ‘point and click’ user interface. Creating a reliable system that is easy to install, use, and upgrade has been a difficult task. The Interchange, however, as its technological manifestations evolve, will increasingly become the mechanism for the creation of virtual communities of the sort that develop spontaneously in campus settings.

The most important issue: Planning and managing a multi-campus, flexible mode university

At the beginning of 1992, Deakin University, with campuses in the regional communities of Geelong and Warrnambool, merged with three campuses of Victoria College in metropolitan Melbourne. Deakin had a strong tradition of distance education while Victoria College was almost exclusively campus-based. The challenge was to bring together the distinct cultures of the two institutions to create a new Deakin University with a common vision that would be in a position to operate effectively in the new national and international environment of higher education. From the distance education perspective, it was important that, at Geelong and Warrnambool, distance education and on-campus education were integrated in a dual mode model, with more than half the students and 38 percent of equivalent full-time load studying at a distance.

The new university determined early that distance education was one of its strengths and should be spread across its campuses. Several strategic decisions were critical to developments: structural integration; course rationalisation; resource-based learning and technology integration; and industry-based and professional programmes.

Structural integration

Deakin University did not adopt a federated model in which the regional and metropolitan campuses would operate with some degree of independence and duplicated services; instead, it opted for full structural integration. In academic terms, seventeen faculties were reduced to five, each with from two to five schools (or departments). While a small number of schools are based predominantly on one campus, the majority of schools and all faculties have staff spread across different campuses. This means that academic decisions pertaining to distance education, at the faculty and school level and in terms of university policy, engage the entire university rather than a traditional interest group. Administrative and academic service divisions of the university are similarly integrated. In some cases, a particular type of operation is based on one campus; for example, the off-campus library service operates from one of the Geelong campuses but draws on the resources of all campus libraries. In other cases, services of a division or branch are available on a number of campuses; for example, Learning Resources Services, which is responsible for the physical development and production of learning materials, has distributed staff and facilities.

Course rationalisation

Flexible learning options for students required an integrated curriculum with common cross-campus courses (programmes of study) and course units. Academic staff in a particular field or discipline, who may have been based on a number of different campuses, were required to review areas of overlap and develop single course structures; for example, several Bachelor of Business and Bachelor of Commerce degree courses became one Bachelor of Commerce taught on three campuses and off-campus. In fields that typically have fewer required units and more options (for example, history) academic staff were encouraged to review the units of the predecessor institutions and create a coherent selection that would be offered across the university.

Resource-based learning and technology integration

Flexible learning, including cross-campus delivery as well as distance education, could best be served by the development of learning resources for use by all students. This approach had its origins in the Deakin University of the late 1970s when the open campus, with on-campus students using off-campus materials, was conceived as transforming teaching and learning for all students and academic staff. Following the mergers, the university's distance education infrastructure, including educational developers and Learning Resources Services, were deployed in developments and redevelopments across the university. At the same time, the university set a policy of technology integration with particular emphasis on information technology and computer communication. In 1995, Deakin was named Australian University of the Year on the basis of its integration of technology into teaching and learning.

Industry-based and professional programmes

Both predecessor institutions had innovative programmes for students outside the regular government funding structures. Victoria College's Technology Management Programme saw students in major industries use laptop computers to access technical (Technical And Further Education) and university courses year round in a self-paced system. Deakin Geelong's Centre for Management Services provided development and delivery services for professional associations on a contract basis, enabling the associations to offer continuing education at a distance. These activities were merged in Deakin Australia, which continues a successful record of providing distance education services to the professions and industry. Some programmes offered through Deakin Australia are accredited by the university. In one case of co-operation, Deakin University and the Association of Professional Engineers, Scientists, and Managers of Australia offer a joint MBA degree in Australia and internationally using Deakin Australia facilities and services.

Summary

The result is a new type of university that is unrecognisable in the terms of its predecessor institutions. The transformation, of course, is not complete, and never will be in this environment of continuous change in higher education. We believe that Deakin University is in a better position than it would have been without such radical restructuring. In our view, essential ingredients for success in such an endeavour are:

- strong leadership, including appropriate rhetoric about the mission of the university;
- a programme of change management that allows all parts of the institution to understand and accept their new roles; and
- serious commitment to professional development to address the changing nature of academic and administrative work.

External Studies at Murdoch University

Prepared by:

Patrick Guiton

Brief description of the programme

Murdoch is a dual mode university where external study is a viable alternative mode of study that is available to all students rather than a substitute mode of study to accommodate the disadvantaged needs of those who cannot get the 'real thing'. Because more than 70 percent of the university's credit offerings are available for study either on- or off-campus, students exercise their choice of mode on a unit-by-unit basis and many study concurrently in both modes.

Problems encountered

Planning and managing distance education

- Maintaining university commitment to a Centre for Off-campus (External) Studies in the face of policies favouring devolution of managerial and financial responsibility to individual schools of study.
- Allocating systematic workload release time for academic staff engaged in the development of a second (distance education) mode of learning resource materials.

Implementing quality assurance

- Involving academic staff in dual mode teaching to adopt the view that assuring a common curriculum regardless of study mode demands flexibility not identity in delivery method or style.
- Establishing a consistent house style across a large range (250 units per annum) of courses despite a relatively small enrolment (average 30 units).
- Gaining acceptance by staff of quality assurance as a standard course design improvement procedure not as a punitive measure.

Using and integrating media in distance education

- Deciding the point at which it may be assumed that a technological innovation (audio or video cassette; personal computer; and e-mail) has become sufficiently widely diffused to justify its use as a compulsory component of course materials.
- Getting to the point at which academic staff involved in dual mode teaching recognise the value to themselves of modifying their face-to-face teaching by integrating the use of guided independent learning resources into the classroom mode.

- Addressing staff development needs associated with integrating new communication technologies into course design.

Instructional design and production

- Justifying the annual update and production of print and audio resource materials for all courses as a means of ensuring parity of curriculum content both ‘on-campus’ and ‘off-campus’.
- Maintaining a course development and production pattern spread throughout the calendar year rather than bunched around the peaks and troughs of the standard academic calendar.
- Developing and disseminating new instructional design techniques for on-line publication.

Learner support systems

- Gresham’s Law of Organisational Life — ‘Work drives out avoidable work regardless of its relative importance’ — translated to the dual mode context, means getting academic staff to give equal attention to the external student’s mailed assignment or telephone call as to the internal student’s knock on the door.
- Providing realistic and consistent support for isolated students in a geographic context that regularly places a student 200 kilometres from the next student and up to 1,000 kilometres from another enrolment in the same unit of study.

The most important issue: Maintaining university commitment

In calling these issues ‘challenges’ rather than ‘problems’, I suggest that all except maintaining university commitment are, in fact, challenges that anyone setting up and running a Centre for Distance Education in a dual mode university will have to deal with if the enterprise is to succeed. Maintaining university commitment is of a different order in that it reflects the influence of broad economic rationalist thinking from beyond the arena of academic policy and university politics. For that reason, it must be the most important issue.

In dealing with all the other challenges, we argue for acceptance of the distance mode as a viable alternative and equivalent mode not as a poor substitute: in short, we claim it as part of the mainstream of university life. When times get tough and resources get short, those whom we have spent our time convincing are tempted to ‘hoist us with our own petard’. If distance education is a mainstream function, it is argued, then why does the university need to spend significant resources maintaining a specialist organisational centre to handle the distance mode and the needs of its students separate from the mainstream university structures provided by the schools and the registry?

In these hard economic times, a highly professional centre for external or off-campus studies in the dual mode system can all too easily become a victim of its own success. But it is evident enough that success in coping with all the other challenges has always depended on the vigilance, persistence, and single-mindedness of professional distance educators working from a visible and well-recognised centre. So a challenge translates into a problem.

Open Access College

Prepared by:

Marg Beagley

Brief description of the programme

The Open Access College (OAC) opened in January 1991, replacing the former South Australian Correspondence School. The college's vision is to 'recognise, value, and celebrate its uniqueness and the diversity of its people. It is an organisation whose business is teaching and learning ... and as its very title suggests, all of its operations will be founded on the core values of access and openness'.

The teaching and learning programme involves interaction with students using a range of technologies, including high-frequency radio, telephone, facsimile, and electronic classroom techniques, as well as through a visiting programme, mini-schools, camps, and school experience weeks.

The college has the responsibility of redressing the educational disadvantage for children which arises from remoteness and isolation. It provides opportunities for students in metropolitan, rural, and remote areas of South Australia to gain access to a broader curriculum.

What is the Open Access College?

The establishment of the Open Access College was a key strategy in the management and co-ordination of the increased demand for distance education in South Australia. The college is a multi-campus organisation consisting of:

- *Three Schools of Distance Education*
 - reception to year 10 (Marden site, metropolitan Adelaide),
 - senior secondary (Marden), and
 - reception to year 12 (Port Augusta site, 300 kilometres by road from the Marden site);
- *Open Access Materials Unit*
 - responsible for refinement, development, and production of open access course materials; and
- *Outreach Education Services*
 - providing educational support for a range of cultural and scientific institutions, for example, the State Zoo, Museum, Botanical Gardens.

Student profile

Students for whom services are provided by the schools of distance education come from the following groups:

- students in government schools and non-government schools;
- remote and isolated students, including some South Australians who are resident or travelling interstate or overseas;
- post-secondary age students, including prisoners, adult re-entry students, and students in full-time vocational courses; and
- special needs students, including medical-based and student behaviour management enrolments.

Problems encountered

Planning and managing distance education

- Although close liaison between course developers and teachers is needed, it is at times difficult due to different tenure of employment.
- Teaching through course packages is supplemented by telephone, radio lessons, or both; teleconferencing; and visits.
- The range of clients at any given year level is very wide, with a high turnover of students, particularly in the reception to year 10 levels. Continuity and short-term enrolments can present difficulties in the management of learning activities.

Implementing quality assurance

- Quality checks are built in at the course development level — writers are selected on merit; reference groups provide feedback at all stages of course development.
- Feedback and liaison between teachers and course developers are vital parts of the writing process.
- Quality checks are built into the materials production process.

Using and integrating media in distance education

- The use of media varies widely — audio and video are considered integral components of course development.
- The use of other media is optional where possible — videoconferencing, teleconferencing, facsimile, Electronic Classroom™, as facilities for students permit.
- Internet resources are being developed as an option for those students with access.

Instructional design and production for distance education

- Principles for course development include teaching and learning methodologies, course structure, and presentation elements.
- Course structure, design, and layout are based on 12 learning principles developed by the Open Access College.
- Course materials are developed on-site at the Open Access College in the Materials Unit; artists, keyboarders, electronic media studio, printing, and distribution facilities are utilised.

Learner support system

- Learners are provided with high-quality course materials for distance education, supported by teacher contact, and electronic learning strategies. Itinerant teachers visit primary students in remote areas.
- Counselling and resource centre services are available from the Marden site to support students in enrolment, personal concerns, and future option decisions.
- Supervisors work with school- and home-based students, particularly primary students and those in remote areas.

The most important issue: Using and integrating media in distance education

While the print medium is central to the delivery of courses through distance education from reception to year 12 levels, the use of other media is rapidly becoming an integrated part of all course development. It is expected that aural and visual media will be used in all courses so that different styles of learning can be addressed.

- Students are provided with audio and video cassettes to provide stimuli for the work that they do alone or with the assistance of a supervisor.
- Teachers and students have print material from which to work, and this is augmented by aural and oral contact with the teacher through high-frequency radio, telephone links, or both, varying from daily to weekly lessons.
- The most basic form of electronic media is the teleconference in which several students may be linked with the teacher by telephone for their weekly lesson. Interaction between students and teacher is possible, although clearly the group dynamic takes time to establish using this type of communication.
- Where students have access, videoconferencing is possible giving the visual as well as the audio contact; it is generally not available as a multi-point medium but enables closer contact between teacher and student.
- The Electronic Classroom™ allows interactive learning to occur through the use of electronic whiteboard, video, and audio. Using this medium, the teacher and the student are able to exchange work and produce diagrams, maps, and written work in much the same way as they would face to face.

Depending on the availability of student access, each of these electronic media are used daily by teachers in their delivery of lessons to isolated students.

Current developments include the use of the Internet to provide stimulus not previously possible through distance education. The Open Access College has allocated considerable time and resources to the development of its Web site and specific subject pages, enabling course writers to provide Internet options for students who have access to this technology. The range of subjects utilising this medium at present includes the arts, legal studies, social studies, biology, environmental studies, geology, and home economics, as well as languages other than English.

In particular, the languages other than English (French, German, Indonesian, and Spanish) have used this medium to great advantage. Students can be given a selection of Web sites chosen for specific research, or the teacher is able to introduce new

learning materials. For example, a student of Spanish is able to view an exhibition of etchings by Francisco Goya, produced co-operatively with the Art Gallery of South Australia. The student can also search for specific resources on aspects of culture — food, dance, and music — researched by the developer, and included in the subject page. The subject can incorporate a more holistic approach to learning for its student clients and allow them to access current, stimulating events to enhance their learning.

Information on each of the Outreach Education Services provided by the Open Access College as well as on cultural events and activities is also available through the home page.

The inclusion of the Internet resource must be an option at present as many students (particularly those in remote areas) do not have access to the Internet or even, in some case, to telephone communication. Nevertheless, it is a growing area, and one that is providing an exciting and stimulating aspect to distance education in South Australia.

Please visit our home page at http://www.saschools.edu.au/open_acc/open_acc.html

Open Learning Institute Charles Sturt University

Prepared by:

David Meacham

Brief description of the programme

The Open Learning Institute (OLI) of Charles Sturt University (CSU), a multi-campus institution, is located in several cities in inland New South Wales in Eastern Australia.

Charles Sturt University offers a wide range of degree courses, both on-campus and through distance education, using print and electronic instructional media.

The Open Learning Institute is responsible for research and development, learning materials, design, production, student liaison, and academic staff development.

The university is expanding its proportion of off-campus students, with only about 13 percent being recruited directly from high school on the basis of their learning certificate results. An increasing number of overseas students study both at a distance and on-campus. Charles Sturt University is currently the largest single university provider of distance education in Australia and is seeking to expand its market by introducing both greater choice and greater flexibility of learning for its clients, many of whom are young professionals seeking to enhance their careers.

Problems encountered

In a time of rapid social and technological change coupled with government induced destabilisation of universities, many issues are emerging relating to the future role of distance education and its efficient operation in a client focused market, where needs may have to be met with diminishing resources.

Planning and managing distance education

- In a dual mode institution, structures and practices develop primarily to serve on-campus students who are now in the minority. This focus creates problems in introducing new systems for learners who require flexibility and asynchronous teaching. Currently the university is attempting to expand resource-based learning to allow greater flexibility in study time and location, which is problematic in a conventional two-semester system with fixed entry and exit times.
- Structures in the university are based on substantive areas of study, that is, schools, faculties, and centres, and functional divisions (for example, Information Technology and Financial Services). The Open Learning Institute exists to service a particular mode of learning that has become dominant. In addition, there has been considerable devolution of organisation and financial responsibility in an environment of diminishing resources. Consequently it is extremely difficult to

develop a corporate or institutional approach to distance education when large numbers of factions with particular self-interests demand more from severely limited budgets.

- The volatile external political and economic environment makes forward planning difficult. Politically and economically it has become expedient to attempt to increase the level of student support for distance learners, while reducing expenditure. This situation has the potential to precipitate extreme management problems.

Implementing quality assurance

- The Open Learning Institute has begun a comprehensive quality assurance programme, starting with the development of a series of comprehensive procedure manuals. These manuals are proving difficult to update during a time of rapidly changing structures and priorities.
- In the university there is a large degree of scepticism about the effectiveness of industrially derived quality assurance schemes in higher education. In contrast, the political imperative is to develop sophisticated responses to government inspired quality audits that could significantly influence future funding.

Using and integrating media in open learning

- The university has enthusiastically embraced the use of non-print media in distance education. However, there is considerable increase in development costs in continuing to offer print materials with a multimedia alternative, or by using some multimedia to complement print.
- Important equity and marketing issues need to be addressed with regard to the use of integrated multimedia. The technology policy of the university will require new students to access specified personal computer hardware and software, eliminating some potential clients and attracting others, unless alternative provision exists for a while.
- The early stages of transfer to a predominantly electronic medium of distance education have led to some materials being made available that are little more than digital textbooks. More research needs to be done on the value added by various media and their suitability for specific applications.

Instructional design and production for distance education

- The integration of electronic media into distance education resources has required the recruitment of specialist instructional designers who have expertise in video, authorware, and Web design. General instructional designers, whose competence is mainly in the area of print, have become somewhat apprehensive as resources are moved to support emerging technologies.
- Electronic media are being produced by individual teaching staff with limited input from educational designers, making quality control problematical. Print materials are rigorously checked before dispatch, after a comprehensive editorial

process. New technologies are emerging at a rate that outstrips the development of systems to support and control their use.

Learner support systems

- The university has traditionally provided compulsory residential schools for many subjects, where group work and the use of specialised equipment were deemed to be necessary for appropriate understanding and competency development.
- Such provision is currently being challenged on the grounds that residential schools are costly, both for the university and for the student, who has to leave work and often travel long distances. Consequently, alternative, media-based means of support are being developed, sometimes against the views of the traditionalists, who regard face-to-face contact with students as a necessary ingredient for effective learning.

The most important issue: Finding alternatives to face-to-face contact

An important contemporary issue is the university's lack of a structured, informed approach to the offering of residential schools.

The original intention was to require distance education students to attend campus for not more than two weeks per year to obtain intensive instruction, practice in areas in which human interaction or a specialist environment was a precondition for understanding and skill development, or both. Residential schools also provided an assurance to accrediting bodies, employers, and professional associations that distance education was not inferior to conventional teaching. The issue of parity of esteem between on- and off-campus courses was of paramount importance in the early days of distance education in Australia, but has diminished with widespread acceptance of the quality of distance education graduates.

Over the years, differences emerged between the two colleges that amalgamated to form the new university. Historical factors led to one campus offering course-based residential schools on a reduced scale, while another campus offered a greater level of subject-based residential schools. The original intent of residential schools appeared to be diluted, with idiosyncratic, campus-based views dominating. At the same time, emerging technologies capable of providing group interaction and simulations were not promoted and implemented on an institutional basis as an effective substitute for the on-campus instruction residential schools provided.

The Academic Senate of the university issued regulations concerning the conduct of residential schools which were often ignored or circumvented by the substitution of 'optional' residential schools operating under different or even no rules whatsoever.

Consequently, the Senate undertook to review its policy in this area, and adherence to it.

A working party investigated the issue and concluded that decisions about the offering of residential schools should be made on a transparent and rational basis, with such decisions being the responsibility of specific staff members. It also required monitoring and accountability systems to ensure conformance.

In addition, the Open Learning Institute seconded a staff member to research media-based alternatives to face-to-face teaching.

Thus the outcomes in the near future should be:

- the restoration of pedagogic considerations as the prime determinants of the existence of residential schools;
- an improved system of accountability; and
- research upon which to base decisions about appropriate modes of teaching.

It would be presumptuous to believe that procedural change and research will achieve all these improvements. Little has been done to address entrenched attitudes, which differ on the various campuses, and had their genesis in groups working in isolation from one another and in the corporate goals of the university. Scant attention may be given to regulations and recommended practice emanating from outside these groups. For success to be achieved, the benefits of both change and conformity must be clearly conveyed to the stakeholders, unless they are to revert to their comfort zone of familiar practice.

Summary

The following lessons can be learned from this study:

- Instructional design issues can only be resolved satisfactorily in an organisational context.
- The logic of pedagogy may conflict with the requirements of the market, the institution, and individual stockholders.
- Instructional design issues involve innovation and change; therefore, they require changed management components for successful implementation.
- Responses to external pressures on universities may lead to a diminution of the importance of pedagogical considerations.
- The structure and decision making processes of universities make innovation arising from outside the school structure and central administration problematic to deliver and monitor.
- The necessity for face-to-face contact to complement distance education in this context is poorly researched and lacks objective articulation.
- The mere availability of technology does little to ensure its institutionalisation.
- Institutionalisation of changes in teaching methodology is highly problematic in multi-campus institutions with highly devolved decision making and financial process.

**Distance Education Unit
Centre for Continuing Education
University of Botswana**

Prepared by:

J. W. Kamau

Brief description of the programme

The University of Botswana, which hitherto existed as a constituent college of the University of Botswana, Lesotho, and Swaziland (UBLS), became a separate national university in 1982. The university is a dual mode institution that offers on-campus degree programmes through various academic faculties, conducts research through various institutes, and provides off-campus academic and other outreach programmes through the Centre for Continuing Education where the Distance Education Unit is based. The mandate of the Centre for Continuing Education is to provide educational opportunities to adults through distance education, evening and weekend classes, public education conferences, workshops, seminars, and radio programmes on a variety of subjects that are in high demand by the public.

The university's involvement with distance education dates back to the 1970s when radio campaigns, complemented by face-to-face contact, were used to educate the public on issues of national interest such as civic education. Geographically, Botswana is a vast country and radio broadcasts could reach many people simultaneously. Today, the main responsibility of the Distance Education Unit, which conducts its distance education programmes mainly through the print medium, is to increase the university's capacity for distance education and, in collaboration with relevant departments, to identify and develop certificate and non-certificate programmes for delivery at a distance. The Distance Education Unit plans to provide programmes at non-credit, certificate, diploma, degree, and post-graduate levels. Currently, the unit offers a certificate in adult education for people involved in literacy, adult, continuing, and community education programmes. A diploma in primary education commenced in 1998 to upgrade primary teacher's certificate holders in a bid to raise the standards and quality of education at the grassroots level. Plans to launch further programmes are also underway.

The certificate in adult education course development experience

The Distance Education Unit has, in the past, offered a certificate in adult education programme in a semi-distance education mode, with materials developed by consultants and heavy reliance being placed on residential study schools in Gaborone, where most of the teaching has taken place. This programme was reviewed in 1989 and is being revised so that it can be offered completely by distance education.

This exercise has proved to be a useful pilot project, as it has brought to light a number of problems in the area of materials development that the unit will have to address in the future. These problems relate largely to four specific areas of course development: the development of the syllabus, the recruitment of course writers, the submission of a first draft, and the actual development of the materials.

Developing the syllabus

The syllabus outline for each of the five courses was developed as a collaborative effort between the Distance Education Unit and lecturers in the Department of Adult Education who have been teaching the courses. As each course will be taught over a two-semester academic year, courses were divided into two modules, each consisting of 10 to 15 units, but no firm guidelines were set regarding the exact number of units that would comprise each module. The content of each unit was then detailed under several major topic areas. Course writers were thus armed with mutually agreed upon unit outlines to use as the basis for their writing but these were insufficiently detailed.

Recruiting course writers

In the unit's material development process, course writers are recruited mostly from the co-operating departments and colleges that run the on-campus equivalent of the programmes. In the Certificate in Adult Education programme, some of the course writers have been drawn from the Distance Education Unit because of their professional training in adult education. A decision was made that all writers, apart from unit staff, would be paid for their services and that all materials developed would be recognised as academic publications for staff appraisal purposes. Contracts were not signed as they required the approval of university authorities. Thus, course writers have proceeded with their task on the assumption that they will be paid for their efforts in due course. In each course, at least two course writers were appointed and decisions relating to a division of the writing workload was left up to the individuals concerned.

As distance education has not been a significant feature of the University of Botswana in the past, it is understandable that most writers have not had any experience of writing materials for distance learners. As a result, course writing workshops were held to train writers for this specific function. During these workshops, the writers were made aware of the nature of distance education programmes, the features that would be expected in materials, and the reasons for incorporating them. They were advised that a typical unit should be 10 to 15 typed pages in length and consist of an overview, unit objectives, several sections of content divided into subsections, interactive questions, a summary, self-assessment questions on the whole unit, and a list of additional reading materials. They then set off to start writing.

Submitting the first draft

In most cases, materials were not forthcoming as writers were preoccupied with teaching activities and could not find the time to devote to additional tasks. Many manuscripts, when submitted, did not conform to expectations, and in some cases, ignored the guidelines altogether. Consequently, the decision was made to hold a series of writing retreats during which writers were isolated in comfortable surroundings conducive to the activity of writing. Secretaries accompanied the group

to word process materials as they were submitted and there were high expectations that all units for both modules would materialise. In reality, although these retreats have produced units, less than half of the expected output has been achieved.

Once written, units were passed on to the word processors and editor for word processing, formatting, and editing. On the whole, the submission of hand-written manuscripts resulted in unnecessary confusion and delay as word processors struggled to decipher handwriting and instructions. The content was often not divided into subsections with identifiable headings and manuscripts were incomplete as they did not contain all the expected features. Many units did not follow the agreed upon syllabus outline for content and, in some cases, later units were collapsed into previous units and dealt with fleetingly as the agreed range of twelve to fifteen units per module was not met, leading to unequal workloads for students over the semester.

Actually developing the materials

A combination of inexperienced distance education writers and word processors has meant that part-time copy editors had to be employed to work on the initial word processed drafts before they were passed on to the editor. In addition, the volume of work arriving at one time meant that it has not been possible to return a first draft to course writers within a short period of time. The underlying assumption at the time was that hand-written materials would only need word processing and superficial editing and formatting by an editor. The reality has been that this is not the case and that there must be far more concentration on developmental processes if quality standards are to be met. Materials could be improved considerably by the input of instructional design, graphic art, and media staff.

Possible solutions

Identified Problem	Possible Solution
Development of syllabus outline	<ul style="list-style-type: none"> • Divide modules into a set number of units. • Develop behavioural objectives for each unit. • Identify and list major topics to be covered in each unit. • Identify and list sub-topics to be covered under major topics in each unit. • Use this detailed unit outline as a framework for writing.
Recruitment of course writers	<ul style="list-style-type: none"> • Recruit from a wider pool of potential course writers by advertisement. • Utilise a signed contract stipulating firm submission dates, allowing for

Identified Problem	Possible Solution
	<p>progressive payments and requiring the submission of a model unit for assessment of writer suitability.</p> <ul style="list-style-type: none"> • Be prepared to enforce submission deadlines in terms of the contract.
Training of course writers	<ul style="list-style-type: none"> • Provide rigid guidelines stipulating the essential features that will be expected in each unit. • Assess a model unit to determine the course writer's suitability and compliance with requirements. • Extend the training period to permit submission of at least the first two units. • Stress the significance of the team work approach to developing materials and the consequent importance of deadlines.
Submission of a first draft	<ul style="list-style-type: none"> • Stipulate and enforce minimum standards for presentation of hand-written drafts. • Accept only hand-written drafts that are complete.
Course development process	<ul style="list-style-type: none"> • Recognise the importance of developmental staff and increase their numbers accordingly. • Spread realistic submission dates for units over the whole writing period to avoid developmental congestion. • Provide professional development training for word processors. • Appoint instructional design, graphic art, and media staff to enhance and enrich materials.

Open Learning and Information Network

Prepared by:

Genevieve Gallant

Brief description of the programme

The Open Learning and Information Network (OLIN), Memorial University of Newfoundland, and the Newfoundland and Labrador Provincial College partnered to design, develop, and implement a Web-based business course for delivery through the World Wide Web. This joint initiative was funded by Human Resources Development Agreement.

The subject of organisational behaviour is included in nine different post-secondary programmes of study, with transfer credit available between the university course and the college equivalents. Consequently, a Web-based course in organisational behaviour was designed by an instructional design team over a three-month period and delivered to 10 university and 40 college students during the winter 1997 semester.

The Web-based course, delivered in an open learning, distance education format, uses a blend of conventional resources (textbook and study manual) and information and communication technology resources (Web pages of the study manual and a computer conferencing system — *Conferencing on the Web*). The computer conferencing system design allows student-to-student and student-to-instructor interaction and collaborative learning at a distance. Class assignments, both individual and group; two on-line quizzes; opportunities to ask questions of the instructor and professor; and peer interaction are supported by the computer conferencing system.

A student orientation session explaining access to and use of the Web pages and computer conferencing system was delivered via audio through multimedia computers to college students while university students received a face-to-face orientation.

Problems encountered

Planning and managing distance education

- Use of a systematic approach to planning distance education is important and must include using experts from each area of instructional design. The collaborative efforts and expertise of instructional designers, content experts, technical specialists, and administrators are necessary. The roles and timelines for each person must be clearly stated at the beginning of the project.
- The Web-based course on organisational behaviour is offered to both university and college students, and the administrative requirements of each institution are similar, yet different. Incorporation of both sets of regulations for registration,

dropping and adding courses, and examination requires communication with both administrative groups.

- Selection of a computer conferencing system to meet the design needs and learning outcomes requires that criteria be established early on in the planning stage.

Using and integrating media in distance education

- Using the Web and a computer conferencing system to deliver a course is relatively new for faculty and students. Instructor and student awareness of how to use the conferencing system to provide quality learning and the need for a different teaching style is an issue.
- An orientation for both instructor and student is necessary to familiarise them with how to use the media, its benefits for learning at a distance, and expectations for both in creating learning.
- The instructor's role changes from one of 'sage' to that of 'facilitator'.

Instructional design and production for distance education

- Using the team approach to developing and implementing a Web-based distance course is advantageous. Experts in instructional design, Web design, graphics, content, and technical operations working together will make for a quality product.
- Access to the Internet, modem connections, and telephone lines are important issues for instructional designers to consider. Slow modem connections and poor telephone lines limit the size and quality of graphics and increase the need for user-friendly, easy-to-navigate systems.
- Web-based courses have philosophical and pedagogical issues — whether to use linear, textual course design or a design that enables interaction among students and instructors. Technology gives us the ability to design distance education courses with more interactivity, thus overcoming the isolation issue in previous distance education practices.
- To ensure that learning occurs, the instructional designer must be aware of learner needs, learning styles, and the limits of the technology.
- Pacing is important. To keep students on-track and on-time, guidelines must be incorporated into the design of the Web pages and the study manual. Scheduling of course assignments and exams must be manageable. Including a printed study manual and Web pages displaying sections of the study manual are used as organisers.

Learner support systems

- Many learners are novices to the computer and the Internet and learner frustration with the new media is to be expected. To decrease frustration and maintain motivation in the course, the use of technical and human support systems is an absolute. An orientation to the new media, telephone contact during the first two weeks for technical assistance, and instructor feedback, especially in the initial

stages, are necessary. These learner support systems must be established before the course starts.

The most important issue: Instructional design and production for distance education

Our experience in dealing with the issue of using ‘teams of experts’ was positive and beneficial. So many times one or two people are responsible for all the design, production, and delivery of a course. However, using new media to deliver a course requires people with expertise in these areas as not everyone has all the expertise needed for design and delivery of Web-based courses.

The Web-based ‘Organisational Behaviour’ course used an instructional design model. Both the university and college offer courses in organisational behaviour; however, the objectives, some content areas, evaluations, and textbooks differ. To have one course that could be used simultaneously by university and college students required an articulation process. The content experts were a university professor with many years of experience teaching in a face-to-face setting and also in the traditional distance education format, and a college instructor with many years of experience delivering this subject in a classroom setting using a self-directed, competency-based learning approach. The instructional designer worked with both to develop course objectives, content, evaluations, and a study manual.

Graphic and Web designers, the next team, working with the instructional designer, were responsible for determining how much text and content should go on the Web pages. They were also responsible for creating the look and feel of the pages so that they are easy to read, visually effective, user-friendly, and can be downloaded in a short time. Designing the entrance areas to the conferencing system to be visually attractive yet self-explanatory was also completed by this team.

The conferencing system was designed by the instructional designer. Attention was paid to the learner needs, different learning styles, and course requirements, as decided by the content experts, and use of collaborative learning techniques.

Technical support was provided by the systems administrator and a technical specialist. The systems administrator was responsible for mounting the computer conferencing system on the server. The technical specialist was involved in the conferencing system selection and the audio capabilities through the computer for students’ orientation session.

Lessons learned

It is important for all members of the instructional team to be part of the process from the beginning. The technical part of the system is as important as the instructional design. The systems administrator must be allowed enough time to mount the conferencing system on the server to give other members of the team the opportunity to become familiar with how it works, make necessary changes, and work out any anomalies.

Determining computer conferencing criteria that makes using the system easy, accessible, and user-friendly is important. For example, the use of word-wrap for posting and replying to discussions is a must. The ability to attach a file from any

word processing software makes for less Internet time, and allows for spelling correction, editing of text, and reflection on a topic.

Using the audio capability of a multimedia computer provides benefits of talking with learners any time, anywhere. It was used to deliver the orientation session but there were problems in hearing the session because of differences in modem rates, bandwidth, and telephone connections. More time must be allowed (two to three days depending on the number of sites) for technical specialists to tune the audio with the different sites to make the multimedia computer usable and achieve its objective.

**Institute for Educational Development and Extension,
The University College of Education of Winneba
Post-Diploma Bachelor of Education (In-Service)
Distance Education Programme**

Prepared by:

S.A. Kadingdi

Brief description of the programme

Until 1992, diploma teachers who wanted to further their education by upgrading themselves to the degree level had to pursue the same four-year courses planned for sixth-formers at the University of Cape Coast. The University College of Education of Winneba (UCEW) was established in 1993 through the amalgamation of seven diploma-awarding teacher training institutions to serve such diploma teachers. The college was therefore established with the overriding purposes of both preparing teachers and other professionals for service to the nation and improving upon the basic education needs of Ghana by concentrating on the training of teachers at both the Diploma and Bachelor of Education degree levels. UCEW therefore carries out its mission by designing and implementing pre-service education programmes for the preparation of teachers and other personnel. Even though the college was set up to recruit more teachers to pursue higher courses, the limited accommodation facilities available militated against the achievement of this noble objective.

To complement the efforts of the university college in meeting the ever-increasing demand for access to its programmes, the Institute for Educational Development and Extension (IEDE) was established as one of seven academic divisions of UCEW to co-ordinate the offering of some of the courses at a distance. The distance education unit, which is by far the largest of the five units of IEDE, is therefore charged to run the Bachelor of Education (In-Service) degree programme for teachers and teacher trainers holding diploma certificates who expect to study part-time without undue disruption of their work schedules. The programme will run alongside the internal two-year post-diploma Bachelor of Education programme and will offer a degree of equivalent status. Like most distance education programmes in developing countries that have been heavily influenced by donor countries, the IEDE received some funding at least in the beginning from the Department for International Development (DFID), formerly known as the Overseas Development Administration (ODA). DFID invested in the initial survey of the learner profile of prospective students to enrol in the Bachelor of Education programme and also helped to address the training of writers of participating departments through consultancies involving workshops that were run jointly by external experts, the DFID subject advisers, and local counterparts (co-ordinators) of the IEDE. Even though IEDE co-ordinates the course material writing of the departments, the participating departments are responsible for the content of the

distance education programme. UCEW is therefore a dual mode distance education institution using departmental course teams and editors. Co-ordinators at IEDE serve in varying roles from simple proof-reading and assisting with artists' briefs and layout to offering advice for the restructuring of study material.

Problems encountered

Planning and managing distance learning

- Academic staff of the participating departments are not provided release time for the writing and review of their course material. This has caused delays in the submission of course material since lecturers have many functions such as lecturing, organising tutorials, and marking their examinations as well as supervising their on-campus students on teaching practice.

Implementing quality assurance

- Lecturers in the participating departments were initially sceptical about the credibility of the programme, taking into consideration the user-friendly language proposed for the writing of distance education course material. However, this scepticism can be explained in light of some lecturers' inexperience with the delivery systems involved in distance education programmes. It should, however, be emphasised here that external assessors have been engaged to read and comment on the course materials and provide supportive feedback to the course writers. Each course has its own editorial team of two or three members who review the materials initially and provide feedback to the authors.

Using and integrating media in distance education

- The use and integration of media in the distance education programme of UCEW leave much to be desired, since the departments engaged in course writing do not have the basic skills or the necessary equipment to enable them to use any medium other than print.

Instructional design and production for distance education

- Instructional design is the sole responsibility of the departments although co-ordinators at IEDE monitor their work and give advice. The production of course materials is facilitated at IEDE with the help of support staff using the equipment purchased by the DFID.

Learner support systems

- Even though the programme has not yet taken off, the institutional response to student enquiries needs improvement. The preparation of course material by the academic staff needs speeding up to avoid the situation in which students enrolled in the programme have to wait long periods for study materials to be delivered and are consequently frustrated and demotivated. Four regional study centres have been established to provide student support through tutorials and library facilities, with the help of tutors and other supporting staff.

The most important issue: Instructional design and production for distance education

The literature on the Open University of the United Kingdom and many other institutions on distance education indicate that for a course to be implemented, an institution requires about 18 months (some even a lot longer, say three years) from the initiation of the writing process to the implementation of the programme. Although the writing of the distance education material at UCEW began in April 1995, only four courses out of a total of twenty-four first-year courses are on the shelves at present. The heavy teaching workloads of the course writers impedes their ability to deliver the study material as planned.

Staff who have found it difficult to prepare their teaching in the distance mode are given close support from the IEDE co-ordinators, who have been trained in distance education. To this end, therefore, the IEDE co-ordinators have always tried to treat writers with respect and courtesy by sharing with them their concerns and encouraging them to pick up from where they left off. In this way, the co-ordinators provide not only guidance in content, style, and format but also give moral support while urging them to make time to write — despite their heavy teaching workloads. The IEDE co-ordinators also ensure that writers are provided with regular feedback on the progress of writing to the respective course teams. Course writers are encouraged to meet regularly with the co-ordinators to discuss their units.

Realising that a good team can exert pressure to achieve deadlines and equally ensure quality output, the IEDE co-ordinating team instituted departmental academic editorial boards of committed and dedicated writers trained in the editing of distance education material to help more specifically with the content editing of materials. During the editorial training, emphasis was laid on the basic principles of distance education material writing procedures.

This step has to some extent speeded up the writing process even though much is still left to be done. At one time it became clear that one reason writers could not deliver the materials on time was that they managed their time poorly. A workshop on time management was organised to enable writers to make the optimum use of their time.

Future plans

To facilitate the production of the course materials on time, it is important that the UCEW establish realistic workloads and, if possible, set up staff support networks to maintain the writers' morale. There is also the need to consider involving a wider development team by contracting external writers and staff from other institutions. Plans are afoot for a series of short one- to three-day writers' workshops to encourage faster planning, drafting, and reviewing of course materials. A 'writers' surgery' session will likely evolve to give writers the opportunity to bring and share their difficulties with their more experienced and successful colleagues.

University of Guyana Institute of Distance and Continuing Education

Prepared by:

Lynette Anderson

Fitzroy Marcus

Elaine Thomas

Brief description of the programme

The Institute of Distance and Continuing Education (IDCE) began in 1976 as the Extramural Department of the University of Guyana's Faculty of Education. Its objective was to take quality education to adults throughout the 10 regions of Guyana. By 1982, the department had increased the scope and reach of its activities so significantly that it was reconstituted as the Institute of Adult and Continuing Education and assigned a status equivalent to that of a faculty. The newly formed institute was mandated to use distance education modalities to extend its reach to remote and deep riverine areas in order to make educational opportunities accessible to the thousands of Guyanese resident in those areas, who previously were denied such opportunities because of the dual constraints of distance and population spread.

In 1992, the institute launched a pre-university distance education programme aimed at increasing the number of learners qualified to enter the university. A concomitant thrust was the consolidation of IDCE's efforts at raising public awareness about distance education, assisting decision makers to see distance education as a viable option for making education accessible to learners in remote areas, and developing a pool of resource persons. The outcomes include a student body of 1,029 learners drawn from the 10 regions of Guyana, various forms of participation by the institute in the development of all other distance education programmes that have been introduced by other agencies, and IDCE's representation on the National Committee for Distance Education. Out of the institution's involvement in distance education has developed not only a commitment by its administration to making distance education an integral part of its activities, but also a commitment by the administration of the University of Guyana to employing dual mode strategies to offer university level programmes to learners who cannot attend classes at its Turkeyen Campus. A corollary has been the current nomenclature of the institute. The renamed institute has the responsibility of facilitating the introduction of the university's distance education activities.

Problems encountered

Planning and managing distance education

- A participatory approach is one of the characteristics of planning and managing distance education at IDCE. This is evident in the strategies employed in conducting needs analyses and in designing, developing, and implementing the programme.
- Another characteristic is flexibility, since support provision is influenced by the human and physical resources available in the student's region. This support operates on the principle of 'equality of concern' rather than 'equality of provision'.

Implementing quality assurance

- IDCE's distance education programme represents a shift from conventional practice to new approaches to learning. The institute therefore views the implementation of quality assurance strategies as essential since a natural resistance to change must be met with the assurance that standards will be maintained if not surpassed. The challenge lies in ensuring that all involved in the provision of distance education, including academic and non-academic staff, recognise this fact and be sufficiently motivated to strive for excellence at all times.

Using and integrating media in distance education

- The institute's integration of media in the course package is based on the principle that in distance education there is a need to serve various learning styles, to help to reinforce learning, to motivate learners, and to minimise their feelings of isolation.
- Print is the basic medium of instruction. Teleconferencing and audio cassettes are meant to provide valuable support. Despite generous assistance from The Commonwealth of Learning during the period 1992 to 1996, problems were encountered. They included:
 - a poor or non-existent communication infrastructure, including an unreliable electricity supply in remote areas;
 - a lack of telephone links; and
 - a shortage of resource persons adequately trained to prepare and produce the audio material.

Instructional design and production for distance education

- When distance education institutions attempt to produce materials without providing adequate finances, difficulties must arise. In the absence of a central budget for materials production, remuneration for course-writing teams, tutor-markers, and other support staff has been inadequate. Furthermore, an inadequate desktop publishing system has added to the challenges.

Learner support systems

- The distance education programme the institute offers is learner-centred. All its components, whether print-based, classroom-based, or audio-based, are oriented toward the provision of learner support. The challenge lies in the management of the programme. Strategies to meet Guyana's unique geographical, cultural, economic, and educational situation must be developed and implemented.
- Support staff accustomed to the conventional system must be trained and retrained for their task of ensuring that students receive the necessary support. This is essential if learners are to complete their courses successfully.

The most important issue: Supporting learners in remote areas

Supporting learners in the remote areas of Guyana presents a significant challenge to IDCE's distance education system. Overseeing the tutorial system and generally providing learner support services are activities dependent on the deployment of competent and highly motivated staff, as well as a good communication infrastructure. Learners are scattered over vast forested areas, some accessible only by aircraft, where few qualified tutors may reside. Sharing of expertise is difficult even in cases in which only a few miles may have to be covered. An underdeveloped communications infrastructure restricts the use of telephones or teleconferencing. Some access to radio links exists but that, however, does not guarantee quality interaction.

The limited finances available to the university contribute to inadequate funding. Some of the energy of staff is devoted to seeking funds from various local and international sources. The presence of the distance education system is largely due to the range of support (advisory and training) extended by the Commonwealth of Learning. The Organisation of American States (OAS) has also contributed directly to the costs of managing our remote support activities.

Despite the constraints, a mobile team is used to provide tutorial support for learners, matching to some extent the pattern of air services provided to these communities. Most flights to remote areas must originate in the capital, making it difficult for staff from our interior locations to service neighbouring locations. Staff based in the coastal areas, however, can and do make direct flights in, at intervals, to give support to students at specific locations. It is also possible to include competent staff from interior locations to be part of the mobile team providing learner support in areas outside their own locations.

Lessons learned

The provision of learning materials and visits by mobile teams to interior areas needs to be further supported by mentoring, which will prove beneficial in enhancing the learner's ability to study through distance strategies. A further benefit inheres in the fact that interaction between learners and a mentor who understands the environs and cultural practices is highly motivating.

There is also a need to sensitise planners, policy makers, and regional officials as a first step to introducing courses in remote areas. This method has resulted in a collaborative approach to the identification of needs and resource persons.

Indira Gandhi National Open University Electronic Media Production Centre

Prepared by:

Jai Chandiram

Brief description of the programme

The Electronic Media Production Centre (EMPC), located in the new Sanchar Kendra at the Maidan Garhi campus of Indira Gandhi National Open University (IGNOU), has a budget of 700,000,000 rupees to produce educational media materials. The distinguishing feature of IGNOU's distance education programme is the extensive and systematic use of educational media in its courses.

Today the EMPC is an advanced centre for the application of media technologies for distance education and training at the national and international level. The primary functions are: programme production; media education; and research.

Programme production

The tasks involved in programme production include:

- producing audio-visual course materials;
- developing and applying communication technology strategies in distance education;
- developing approaches to integrate communication technologies into existing training programmes;
- undertaking pilot projects in the application of new technologies to improve education, training, and the quality of delivery;
- consulting in education communication systems and technologies;
- expanding the infrastructure for training and delivery in distance education;
- developing high quality course materials for media studies;
- providing an audio-visual library and resource centre; and
- marketing and selling EMPC-IGNOU products and facilities.

Media education

At present, the EMPC offers a one-year Post-Graduate Diploma in Journalism and Mass Communication.

The following additional programmes are under development:

- Diploma in Audio-Video Technology;
- Certificate in Audio Programme Production;

- Certificate in Videography; and
- Certificate in Video Editing.

The following short-term or weekend courses have been planned as an open school:

- ‘Art of Video Presentation’;
- ‘Interview Techniques for Television’;
- ‘TV Studio Lighting Techniques’; and
- ‘Evaluation of Educational Television Programmes’.

Research

The EMPC conducts the following research tasks:

- regular feedback studies on programme use; and
- specially designed studies to assess quality, content, and impact are undertaken from time to time.

Facilities

The facilities available at EMPC include:

- Two large video studios equipped with multi-camera set-ups, ENG beta SP camcorders, edit suites, Quantel Paint Box, audio studios with digital audio cassette format equipped with eight-track recording facility, audio dubbing suite, audio edit suites with multi-format editing facility, duplication facilities, including format transfers and high speed audio cassette duplication, audio-visual library with more than 564 video and 646 audio cassettes of curriculum-based programmes.
- The Training and Development Communication Channel, which is a teleconferencing facility comprising a studio with teaching end and up-linking for two-way audio and one-way video through INSAT-2A on the Extended C band being offered jointly with the Indian Space Research Organisation. Presently 23 receiver terminals located all over the country are linked to the teaching-end studio. Another 135 locations have been identified. This facility is being used for counselling and teaching students as well as providing orientation to regional centre personnel.

The system configuration of the Training and Development Communication Channel is as follows: the teaching-end studio (195 square metres and located in the Sanchar Kendra complex) is equipped with two cameras on tripods and a third camera set up as a caption scanner. Audio and video signals from the control room are fed to the Transportable Remote Area Communications Terminal for up-linking to the INSAT-2A satellite. Direct reception sets are located at state open universities, resource centres, and a few remote study centres, as well as at other user institutions. The return communication is through telephone lines and fax.

Services

The services EMPC offers include:

- producing audiovisuals;
- broadcasting and telecasting through national channels;
- teleconferencing;
- conducting research in educational media;
- providing training in media production, research, and technical operations; and
- offering short-term courses and workshops in script writing, presentation techniques, videography, and technical operations.

Output

So far, EMPC's output includes:

- a total of 606 videos and 659 audios to date;
- about 80 to 100 days of live teleconferences, conducted per year by various schools of as well as other users through the Training and Development Communication Channel; and
- regular feedback reports on data gathered pertaining to the utilisation of the teleconferencing.

Problems encountered

Planning and managing distance education

- During the preparation of audio-visual materials, EMPC works with academics in developing audio-visual productions. The academics concentrate predominantly on the print materials and consequently the audio-visual component is often only a supplementary input of the course materials. The strengths of audio-visual media are yet to be fully explored.
- Greater integration of audio-visuals into print materials in the course materials is being attempted in programmes.
- Greater interaction with counsellors and facilitating their utilisation of audio-visual materials, encouraging students and counsellors to use them as part of the learning system.

Implementing quality assurance

The quality of EMPC programmes is assured through:

- training of technical and programme staff
- preview sessions; and
- increasing interaction at the concept development stage.

Using and integrating media in distance education

- Teleconferencing through the Training and Development Communication Channel. The response of students at weekends is more than weekdays when students are not usually available at the study centres. Certain courses have more active responses (for example, those in the School of Nursing and the MBA programme).

Instructional design and production for distance education

- Instructional design essentially comprises of ‘talking heads’ with few print graphics and is more easily accepted by experts. They are yet to experiment with other flexible interactive formats. The cassette mode of audio-visual materials production is yet to evolve.

Learner support systems

- Access to modes of delivery such as lending library system needs to be strengthened.
- Quicker production and timely delivery system are necessary.

The most important issue: Using and integrating media in distance education through the Training and Development Communication Channel

IGNOU has adopted the multimedia approach to reaching out to its student population. A variety of modes, including print, audio and video, face-to-face counselling, as well as mass media are being adapted. The EMPC produces the curricula-based audio-visual programmes that are distributed to more than 256 study centres located all over the country. In addition, they are broadcast or telecast over the national network three times a week in regularly allotted time slots.

Yet a need for greater interactivity is always felt. The Training and Development Communication Channel at IGNOU has added a new dimension, striving to enhance learning by serving as a critical communication bridge. It helps create a ‘virtual classroom’ environment conducive to real-time interaction, lateral learning, immediacy in communications, and participatory decision-making.

The Training and Development Communication Channel has been in operation since 1993. It is a two-way audio, one-way video teleconferencing facility through INSAT-2A on the Extended C-Band offered jointly with the Indian Space Research Organisation. The teaching end is at EMPC-IGNOU, while about 23 receiver ‘nodes’ are located at all state open universities, regional centres, and a few remote study centres. Efforts are underway to set up at least another 135 nodes in the near future. Other ‘user’ institutions such as the All India Management Association, State Bank of India, and National Dairy Development Board have set up 200 receiver nodes of their own. Other major institutional users include the National Open School, National Centre for Education Research and Training (NCERT) the state governments of Karnataka and Gujarat, the Department of Women and Children, the Department of Electronics, and the Confederation of Indian Industry.

Training functions

IGNOU regularly uses the Training and Development Communication Channel for telecounselling and extended counselling with student groups, and for training resource and study centre counsellors and co-ordinators. Different schools at IGNOU are evolving their own strategies in utilising this facility based on the volume of enrolment in their academic programme, duration of the course, profile of the student groups, and availability of experts.

Other user institutions have put the facility to a variety of uses; for example, the All India Management Association conducts regular classes, and the National Open School and the National Centre for Education Research and Training conduct training sessions for their regional functionaries. The Department of Women and Children launched a popular social welfare programme 'Indira Mahila Yojana', to enable all concerned at the state, district, and village levels to interact with the minister in Delhi.

Response

Regular feedback from the Training and Development Communication Channel's receiver nodes is being sought and available data shows that there have been extremely good responses in some of IGNOU's academic programmes in Management, Nursing, Journalism and Mass Communication, Panchayati Raj, and Tourism, and in most sessions held by other institutions such as those in the Department of Women and Child and the NCERT], wherein a lot of participatory processes were planned into the sessions and sufficient advance notice given. Most students of IGNOU seem to prefer after-office hours and weekend sessions. A feedback research study to assess the utilisation of the teleconferencing system by the student sessions is being undertaken and will be completed by year-end.

Other aspects need study, including the policy, technical, co-ordination, and administrative components, as well as the academic, research, and production components that in one way or the other influence the success of the sessions. Better co-ordination at the headquarters, school, EMPC, Indian Space Research Organisation, and resource and study centre levels are being fine tuned. With resources becoming an additional but critical criteria, efforts are underway to balance in-house use with external use, to make it an economically viable activity. However, there is great scope for improvement in the utilisation of the facility.

Strengths

Technical: The Training and Development Communication Channel is a unique facility using modern satellite-based communication technology. It is eminently suited for mass training simultaneously and cost effective.

Learner content: The Training and Development Communication Channel can improve the quality of training as top level experts could be involved. The asynchronous mode of communication is also possible through recording sessions at the teaching and learning ends and using them in other teaching and learning situations.

Shortcomings

Technical: Due to the poor condition of the telecommunication network in the country, the desired quality and level of interaction is affected. The receiver network is still in the process of expansion.

Learner content: From an academic viewpoint, the audio-visual component, including the Training and Development Communication Channel, is not a mandatory part of the students' learning package. The optional and supplementary status accorded for various reasons results in it being given lower priority by the schools and students. They are yet to adapt fully to utilising the technology-aided visual medium with adequate graphic support. They also lack sufficient advance planning of content. The high rate of technology obsolescence is also adding to the problem. A lack of adequate co-ordination among the various departments involved delayed information flow, affecting attendance at the sessions.

Students are faced with mainly logistic problems in attending the sessions as most are working or live at long distances from the venue.

National Open School: The School that Made a Difference

Prepared by:

Professor Mohan B. Menon

Brief description of the programme

The National Open School (NOS) was set up in 1989 as an autonomous institution under the Ministry of Human Resource Development, Government of India. Its objective is to provide continuing and developmental education through distance and open learning to all those outside the formal education system. With a multimedia package of self-instructional print materials, audio-visual support, and face-to-face teaching, NOS has a strong and effective network of about 800 academic, vocational, and special (for disabled and disadvantaged target groups) study centres all over India and the Middle East. The study centres perform a variety of functions, including admitting students, supplying learning materials to learners, providing and evaluating assignments, conducting personal contact classes, and organising laboratory, workshop, and other practical experiences. The special features of open learning in NOS include freedom to choose subjects according to one's needs, interests, and abilities; no upper age limit; course credit accumulation over a period of five years; academic and vocational courses offered separately and in combination; transfer of credits from other national boards; and use modern communication and information technologies.

The academic courses NOS offers include the following:

- the 'Foundation Course', equivalent to grade 8, which serves as a bridge course for joining the secondary level programme;
- the 'Secondary Education Course', leading to the Secondary School Certificate (O level);
- the 'Senior Secondary Education Course', leading to the Senior Secondary School Certificate (A level);
- open vocational education at basic, elementary, secondary, and senior secondary levels;
- life enrichment and continuing education courses, addressed to the general public and those in various area of work;
- the open basic education programme, aimed at providing continuing education to neo-literates 14 years and older; and
- open elementary education, for the benefit of school-age children who are not attending school.

NOS has a diverse student profile, with learners ranging in age from 14 to 89 years, distributed throughout the country. About 94,000 students were enrolled in 1996–97, which increased to an annual enrolment of more than 110,000 students in 1997–98. Most of the students are young adults between the age of 18 and 24 years.

NOS is also an apex institution at the national level, and has the mandate to provide professional and technical support to state (and provincial) governments to set up and maintain quality in the state open schools.

Problems encountered

Planning and managing distance education

- Managing flexibility without affecting the quality of instructional organisation has been a major problem considering the variety of target groups and wide geographical distribution.
- Managing the instructional experiences provided in 800 study centres, which are formal institutions accredited by NOS, is another major issue.

Implementing quality assurance

- While it has been reasonably possible to maintain quality in instructional inputs, it is difficult to ensure that quality is maintained in contact sessions and practical classes.
- As a large number of part-time tutors (more than 8,000) are involved in organising learning support to students, developing the necessary competencies required for the personal contact programme and counselling in them has been difficult.

Using and integrating media in distance education

- NOS does not have production facilities and hence all audio-visual production is done on contract by production and post-production staff, resulting in quantitative and qualitative improvement in media production.
- NOS uses interactive technologies mainly through one-way video and two-way audio conferencing for orienting and training study centre staff. However, the use of interactive technologies for learning support has not been possible due to a lack of infrastructure at the receiving end.
- Audio and video programmes are used as supplementary input to the self-instructional print materials. They have not been integrated into the self-instructional print materials mainly because all learners may not have an access to them.

Instructional design and production for distance education

- Vocational courses vary considerably and are from various sectors of the economy. Developing curriculum and designing instructional strategies for vocational courses has not been easy.
- Flexible instructional designs for different categories of target groups is necessary in the Indian context. Learners with various types of disabilities and social disadvantages require modification in instructional design and learning materials.

Learner support systems

- The use of suitable pedagogy in the personal contact programmes has not been easy, mainly because teachers are from formal schools and are unacquainted with distance education methodology.

The most important issue: Using and integrating media in distance education

NOS caters to the educational needs of a large number of clientele groups who have been out of the formal schools for one reason or another: social, economic, or geographical disadvantages, or physical and mental disabilities. In order to provide quality education to all these groups in a large country like India, the integration of media is extremely important. However, due to many problems, the major component of the instructional system has been self-instructional print materials distributed to students supported by contact classes and practical work arranged at study centres. Use of media in the system has been marginal for many reasons:

- NOS, which was established in 1989, emphasised three main aspects of the print materials. The Media Unit under the Academic Department was visualised only to co-ordinate production of audio-visual programmes using outside contract producers and post-production staff. The media unit developed no further during the eight years NOS has been in existence. At the moment, NOS is looking for funding from international agencies to set up a temporary production facility as internal funding for production infrastructure will not be forthcoming.
- NOS has been using facilities available with Indira Gandhi National Open University (IGNOU) for one-way video and two-way audio conferencing using the Indian communication satellites INSAT-2A and INSAT-2C. The receiving facilities available in the IGNOU regional centres are also hired by NOS. The use has been mainly to orient and train co-ordinators and tutors in the 800 study centres of NOS. This has been extremely successful; however, the facility has not always been available as many institutions are making use of it. NOS is planning to provide about 10 receiving facilities in Delhi and surrounding areas very soon. NOS has about 120 study centres in this region and enrolls about 35,000 students annually. It plans to start academic counselling and tutoring using the up-link facility and the proposed receiving facilities.
- NOS produces about 60 audio-visual programmes for its secondary (O level) and senior secondary (A level) courses. These programmes are all supplementary and not integrated into the self-instructional print materials. During the instructional design of NOS courses it was assumed that not all students would have access to audio-visual programmes and hence the self-instructional print materials were planned to be developed as complete and self-contained from the learning point of view. Such an approach to design can be changed only after ensuring that all students can either watch or listen to video and audio programmes in the study centres or that these are widely broadcast.
- NOS has approached Doordarshan (Indian National Television) for broadcast time, but unsuccessfully. Alternatively, the ministries of Human Resource Development and Information and Broadcasting are planning to launch a dedicated educational television channel, initially through a cable network and subsequently through

terrestrial transmission], using Doordarshan's low-power transmitters. It is expected that NOS, as well as other educational institutions in the country, will get broadcast time for its programmes. However, if this broadcast channel is available only through a cable network its access will be considerably limited. Most of the villages and small towns in India do not have a cable network facility and even in urban areas it is limited to only well-to-do families. Nevertheless, NOS is increasing production, contracting individual producers and institutions so that a substantial number of video programmes are available.

- NOS is also initiating an Indian Open Schooling Network using the Internet. This network will be linked with The Commonwealth of Learning's Commonwealth Electronic Network for School Education. The Indian Open Schooling Network will provide access to the Internet for all schools and students, who register for a nominal fee and take advantage of information updates in school subjects, career information, and, subsequently, on-line NOS courses.

University of Nairobi

Distance Education Teachers' Programme

Prepared by:

J. O. Odumbe

Brief description of the programme

The College of Education and External Studies distance education teachers' programmes started in 1967 with primary teachers' certificate courses and later, in 1986, a Bachelor of Education (B.Ed.) degree programme was introduced, which eventually replaced the certificate programmes. In 1996, the Post-Graduate Diploma in Education (PGDE) was introduced. Currently the college operates a dual mode programme. The admission to the bachelor's programme is by qualification in the national examinations, while admission to the diploma programme is on the basis of a recognised first degree with at least two teaching subjects. The bachelor's programme takes a minimum of six years, while the diploma programme takes two years. Both programmes are offered by the Department of Educational Studies in the Faculty of External Studies.

The learning system uses specially developed print materials as the main medium of instruction, supported by audio cassettes, audio teleconferencing, and limited face-to-face tutorials of up to two weeks' duration, conducted three times in each academic year. The assessment in these programmes is continual through home written and timed tests as well as end-of-year examinations.

Problems encountered

Planning and managing distance education

- Justifying regulations that provide for flexibility to students.
- Justifying payments for the services rendered by the staff from the internal departments to the Department of Education Studies.

Implementing quality assurance

- Allowing sufficient time to field test materials before production for students.
- Budgeting for the cost of transporting university staff for face-to-face tuition to remote study centres instead of using local staff, who are not well received by students.

Using and integrating media in distance education

- Training students to use each medium appropriately for the purpose it is intended.
- Allowing increased costs to the students and the institution.

Instructional design and production

- Overriding the initial reluctance of writers to accept and see the need for developing materials in the distance education format of presentation, which they felt was too much ‘spoon feeding’.
- Providing resources and time to develop all the materials within the workshop setting, especially for undergraduate and post-graduate materials that need more reference and consultation of sources.
- Encouraging writers to work within the deadlines, especially when there is no lead time.

Learner support systems

- Identifying and developing staff with the right skills, approaches, and attitudes to provide adequate counselling and tutorial services at the study centres.
- Standardising the distribution of infrastructure and learning resources, variations of which create disparity and difficulty to students.
- Providing time and opportunity for adequate individual attention.

The most important issue: Providing guidance and face-to-face tutorial services

These learner support issues are closely connected to quality assurance issues. Apart from helping in the learning process, learner support services also reduce isolation, and sustain or create motivation and confidence to students.

To provide the decentralised tutorial services that play a major role in learner support, the faculty identified tutors from the teacher colleges and universities and organised training for them on tutoring in the distance education system. Enough tutors in each subject were found for all 10 study centres in Kenya. Out of two one-week training sessions conducted for the tutors, a tutors’ handbook was developed and made available to all the tutors. It became a useful guide for briefing new tutors who joined later to replace drop-outs.

When the actual tutoring started, some students were tutored by the university’s course lecturers while others were tutored by college tutors. In some subjects the students felt that those being tutored by course lecturers were advantaged. The feeling became so strong that eventually course lecturers and writers were taken around to each study centre in turn, but this approach became too expensive for the institution and too demanding for individual lecturers.

The regional tutorials were discontinued and instead the residential schools were intensified. Regional tutorials were always presented by course lecturers and have been acceptable to students, who often travel long distances to attend and expect a satisfactory learning opportunity.

For general counselling, the faculty uses resident lecturers who are stationed at six extramural centres in the country. However, these centres do not serve low population density and remote parts of the country; plans are underway to increase the distribution of extramural centres to cover most of the country.

A second move which has been undertaken to provide constant support is by installing audio teleconferencing with eight receiving stations. This technology enables the use of course lecturers throughout the country without strain on their time. This arrangement was made possible by assistance from The Commonwealth of Learning (COL), but budgetary arrangements have been inadequate to sustain it.

The third move has been to prepare students for effective tutorials by encouraging them to read the study materials and identify issues they would like the tutor or course lecturer to explain. As well, at the beginning of a residential school, each student is given a briefing sheet that outlines the objectives and strategies to be used during each specific residential session. This advance information tends to make the students more active participants who do not expect lectures but focus on identified issues.

Last, the part-time tutorial staff and the core staff have been encouraged to allow time for personal attention to students outside class.

University of Nairobi

Prepared by:

Judith W. Kamau

Brief description of the programme

The External Degree Programme of the University of Nairobi is conducted in the Faculty of External Studies, College of Education and External Studies.

The establishment of the External Degree Programme of the University of Nairobi in 1986 followed two feasibility studies in 1976 and 1983, which established the need and relevance of such a programme in Kenya. The External Degree Programme was set up to upgrade both professional and academic qualifications of secondary school teachers who had trained to teach the first two classes of secondary school but who, due to a shortage of staff, found themselves teaching O level and A level classes in the secondary school curriculum. Through distance education these teachers would receive in-service training without leaving their families and as they continued to perform their duties. Of the 600 candidates who were selected and admitted to the programme from more than 3,000 applicants, 504 registered for different subjects in the External Bachelor of Education (Arts) programme.

Problems encountered

Planning and managing distance education

The university with its six colleges is a dual mode institution. The fact that the External Degree Programme operates within a dual mode system has its own inherent problems. The programme has a core of academic staff who serve full-time as subject co-ordinators and are in charge of a group of subjects. This core staff, comprised of subject experts, editor, radio and audio lecturer, and a graphic artist, identify, train, and supervise part-time staff, who are engaged to write, review, and edit instructional materials. The radio and audio lecturer, editor, graphic artist, and printer are in charge of the production and distribution of instructional materials under the supervision of the chair of the Department of External Degrees and the dean of the Faculty of External Studies. Both the chair and the dean answer to the principal of the college, the Deputy Vice-Chancellors, and the Vice-Chancellor, in that hierarchy.

The department and its core staff perform duties similar to those of a publishing house. The subject co-ordinators provide academic guidance and counselling to students during residential sessions and also by correspondence. Each subject co-ordinator handles part-time staff in a whole subject area (for example, history), which constitutes a department of its own in the conventional internal programmes of the university. In this arrangement, part-time staff are paid for their services on a piece work basis. The costs of running the programme are met from government subsidy, student fees (the programmes run on a cost recovery basis), and from the sale of

materials to other institutions such as the Open University of Tanzania; Makerere University, Uganda; and the University of Zimbabwe.

The learning system of the External Degree Programme has been mainly the print materials supported by audio and video cassettes, face-to-face tutorials, and supervised teaching practice, with students studying specially developed print materials in each subject. During the four residential sessions held at the University of Nairobi each year in August, November, January, and April, during school holidays and at the six regional study centres which are spread in six major towns, writers and subject specialists introduce course materials to students, revise course content, and mark assignments and give timed tests that form part of student assessment as provided for in the regulations.

The regional study centres are managed by resident lecturers who are core staff within the External Degree Programme.

Management challenges

The management of the External Degree Programme within a dual mode institution has presented a major challenge.

To start with, the students are external. Where choices must be made, the needs of internal students come first and those of external students come second. This problem is particularly common in the sharing of resources. If the timetable of internal programmes is slightly interrupted, for example, then the residential sessions for external students, which are held at the university where accommodation facilities and tutors are based, must be rescheduled. These interruptions sometimes mean re-scheduling supervised tests and examination schedules, causing frustration to students and part-time staff.

The distance education mode of delivery is not quite understood by senior management. The programme managers on the ground have often found it difficult to explain and justify, for example, expending tuition revenues on the production and reproduction (or reprinting and dubbing) of study materials because the term 'tuition' has a different meaning in the conventional mode.

When the programme started in 1986, students attended regional field tutorials once a month, twelve months a year, in addition to three residential sessions at the University of Nairobi. Although very popular with students, the field tutorials were discontinued in 1990 due to the high costs of paying the field tutors and the accompanying supervision constraints due to limited core staff. However, the hours from the field tutorials were recouped into the residential sessions so that students still have the same number of tutor contact hours per subject. While senior management are convinced about the value of frequent student–tutor physical contact, it is difficult to raise funds to pay for the monthly accommodation and transport bills field tutors incur.

Instructional design and production for distance education

Materials development has been another problem area. When the programme was launched in August 1986, only two units (booklets) in Education were written and ready to go to students in a 10-subject External Degree Programme. Consequently, the other materials were developed as students waited, causing frustration to many. By

the time students were ready for their first-year examinations in 1988 only 388 out of the registered 504 students sat for their exams. By 1990 the programme had only 260 regular students who went on to graduate in 1994. This high drop-out rate was partly due to a lack of study materials to maintain and sustain student motivation and progress through the programme because students lacked credibility about the sustainability of the programme. Also, materials development was delayed due to low motivation on the part of writers, reviewers, and editors, which resulted from delayed payment for work completed because of the long part-time claims scrutinisation process by the finance department. After the claims were approved for payment the amount due was subjected to super scale taxation as required by law, leaving the part-time staff dissatisfied with the very small sum of money earned from writing course materials. As a result, the External Degree Programme lost many good and trained part-time staff, thus prolonging the already protracted materials development process.

Possible solutions

Problem	Suggested Solution
External Degree Programme in a dual mode institution	<ul style="list-style-type: none"> • There is need for some degree of autonomy for the progress of the programme. • Management is often too conservative, leaning more towards the conventional mode. They should be sensitised about the needs of external students. • Measures of full-time students equivalent contact hours should be based on the distance mode requirements rather than on on-campus procedures that do not interface with a distance education programme.
Materials development	<ul style="list-style-type: none"> • There is no need for lead time to develop or acquire ready to use course materials. • A programme that starts with limited study material should wait for the materials to roll off the press before accepting students.
Processing of part-time claims	<ul style="list-style-type: none"> • To avoid delays, the External Degree Programme requires its own budget to process part-time claims and to procure printing and other materials required for the production of study materials. Of course, this budget would be subject to both internal and external audit as is

Problem	Suggested Solution
	the rest of the university.
Learner support services	<ul style="list-style-type: none"> • Support services are a vital link between students and the institution providing the programme. • Field tutorials should not be substituted with anything else as they provide the maintenance function for learners who are isolated from the providing institution, their tutors, and from fellow learners. • Logistics for implementation costs, who will bear them, and the availability of physical facilities and field tutors should be planned well in advance in order to limit drawbacks after the programme is launched. • However, the programme has now come of age and the regional centres are now available. The arrangements on the ground seem to satisfy the needs of the students and programme providers adequately.

Conclusion

The External Degree Programme has been a real eye opener. Following successful completion and graduation of the first cohort of 260 students in December 1994, a second cohort of 1,500 students enrolled in August 1995 and the drop-out rate is negligible because most of the study materials required in the Bachelor of Education (Arts) course are now readily available. Study materials from this programme have helped expand education frontiers through distance education to other countries and other institutions in Kenya. In time there has been a cost benefit accrued from the study materials as different cohorts of students use the materials, thus reducing the unit costs substantially.

Massey University Women's Studies Programme Research for Social Change: A Third Year Compulsory Course

Prepared by:

Catherine Bray

Brief description of the programme

At Massey University, the Women's Studies Programme course 'Research for Social Change', compulsory in the third year, is designed to present information about feminist research for social change in Aotearoa (New Zealand). It weaves together three strands: explanation of research skills (methods); evaluation of research methods (methodology and epistemology); and description of particular New Zealand feminist research projects. Students are required to conduct research for social change and to evaluate published research.

Problems encountered

Planning and managing distance education

- This one semester course is based on a similar course developed and delivered at Athabasca University in Canada. Therefore, the major planning consisted of translating from an open environment in which the students operate on their own timeline and are constrained only by the need to complete the project within six months, to a semestered environment in which a student cohort proceeds together and intermediate assignment deadlines are enforced. This translation resulted in changes to the instructional design, described below.

Implementing quality assurance

- Quality controls consist of normal standards of scholarship, adherence to university-wide key performance indicators, assessment by colleagues within women's studies, and student evaluations.

Using and integrating media in distance education

- Delivery methods include post, telephone, and, where available to the students, e-mail.

Instructional design and production for distance education

- The most important design element to include in an upper year skills building course such as 'Research for Social Change' is the opportunity for the students to consult with tutors and other students about their projects as they complete their research. Production is print-based, on the Massey campus, using editorial and educational consultants.

Learner support systems

- Learner support systems include tutors, the international students' office, regional advisers, chaplaincy, disabilities office, English Language Centre, student counselling service, and the Massey University library. The Extramural Students' Society facilitates communication between students by mail and the Centre for University Extramural Studies organises optional regional gatherings for students and tutors.

The most important issue: Instructional design and production

In 1993 I developed Athabasca University's course Women's Studies 444 'Feminist Research Methodology'. This course has been successfully delivered to a small number of fourth year women's studies major Bachelor of Arts students each year. As part of my work at Massey University, I am designing a similar course for the Aotearoa environment. The lessons I have learned through this process include the following.

- Some of the classic material in the field of women's studies seems applicable in 'western' countries around the world. A canon has developed in women's studies as in other fields.
- As a consequence of the need to ground the course in the New Zealand experience, about 40 percent of the teaching materials are new.
- Instructional design is affected by the following differences:
 - Students usually pay for their phone calls to tutors at Massey but not at Athabasca.
 - There are intermediate assignment deadlines at Massey but none at Athabasca.
 - There are more international students at Massey.

Therefore, the study and administration guide at Massey must include more assistance with the process of learning (for example, precise information on note taking, sample quiz answers, more explicit grading guidelines).

Massey University is a 'dual mode' institution, which delivers its courses both extramurally and internally. Because of the more rapid production and revision of courses at Massey than at Athabasca, as well as on-campus teaching, there is less time for lecturers to devote to course writing, and the study guide therefore includes less by way of commentary. Where thoroughgoing synthesis are included in Athabasca study guides, Massey study guides contain shorter questions and commentaries. However, Massey texts and study guides can be more up-to-date because of the more rapid re-development of materials.

The dual mode institution allows the testing of materials in a classroom situation, prior to delivery at a distance, allowing the refinement of commentaries to be included in the study guide. However, distinctive components for extramural delivery must still be created, in keeping with the difference learning process.

University of Papua New Guinea Institute of Distance and Continuing Education

Prepared by:

Harold Markowitz

Brief description of the programme

Distance education began at the University of Papua New Guinea in 1974, with the establishment of the Department of Extension Studies. In 1994, the Institute of Distance and Continuing Education (IDCE) replaced Extension Studies, adopting a broader mission and new funding and reporting processes. Enrolment in the distance education programme has increased continuously in recent years, with growth in all programme areas and at each of the 15 distance education centres in the provinces and on the main campus in the National Capital District. The central activities are the Matriculation Programme (upper high school), the Diploma in Commerce Programme (two-year university diploma in accounting), the Bachelor of Education In-service Programme (for upgrading elementary teachers), and the Non-credit Programme (maths and English review). In 1996 there were approximately 16,000 course enrolments throughout Papua New Guinea (up from 4,000 in 1991), and, in 1997, enrolment is expected to show continued increases.

Problems encountered

Planning and managing distance education

- A lack of planning for growth in distance education is a serious problem. The nation is growing at an annual rate that exceeds most other nations, yet the high school system has increased its intake only slightly by building new schools and the university system has not increased its intake in several years. Increasing enrolments result from the increasing demand for distance education, and increasing enrolments also result from the opening of new centres and new courses, but due to national financial limitations the institution has had repeated cuts in staff and funding.

Using and integrating media

- Courses are based entirely on the printed page and tutoring, and no media have been introduced. The tropical environment and the lack of air conditioning results in prompt growth of mold on the few audio and video cassettes that have been obtained, soon making them unusable. There are no facilities for creating audio or video cassettes, no staffing or funds to do so, and equipment for playing cassettes exists only at a few centres (and then it is typically one machine in the director's office). Most centres have a computer for administrative use, but only in one centre are computers used for education.

The most important issue: The planning environment at the university

Guidelines for IDCE planning are derived primarily from three documents: The national higher education plan, the University of Papua New Guinea's five-year plan, and the plan for the institute. Though these documents assign our mission and provide the best and most comprehensive structure for our activities, problems with each limit their usefulness.

Both the national higher education plan and the University of Papua New Guinea's five-year plan have gone unrevised for several years, well beyond the period they were intended to cover, and thus they reflect the priorities and values of several years ago. An example of an outdated value is the advocacy of goals for IDCE enrolment growth that are so conservative that they were fully achieved six years ago. Current issues and the concerns of the nation and the university have not been woven into the structure of these documents. Examples here are the failure to address the massive change in teacher education and new educational standards, and the failure to reflect major changes in educational emphasis growing out of the restructuring of our national and provincial governments.

Lacking any other guidance, the guidelines provided by the higher education plan and the University of Papua New Guinea's five-year plan have been closely reflected in the plan for the institute. Indeed, the rationale for operation as an institute is presented in the national higher education plan. The national plan also provides the framework within which growth and development of the institute is expected to occur. IDCE has continued to take the derived plan for the institute very seriously, particularly since it has been endorsed by the University Planning Committee, the Academic Board, and the University Council. This document was the basis for recurrent requests for increased staffing and financial resources in the past three years, without any results. In fact, the IDCE central office's annual budget of 140,000 kina in 1994 has been reduced to 23,000 kina in 1997, which is the equivalent of about one United States dollar per course enrolment. Over the past six years we have repeatedly proposed that a standard be adopted for staffing (most recently suggesting a ratio of 1,000 students to each academic, which if accepted would double our staff) but no action has ever been taken. It must be said that there has been no detectable support for the planning process as a basis for resource allocation in the university.

The plan for the institute contains our view of the IDCE's future, and as such it is our guideline for mission accomplishment. For example, in the years ahead our priorities for growth in certain areas and reduction in others will be as outlined in the plan. Similarly, later this year when IDCE occupies the new building constructed for it by the European Union, and when IDCE eventually expands its staff and incorporates new media, the utilisation of these resources will be as described in the plan. If and when the national higher education plan or the university five-year plan is revised in the future, the plan for the institute will then be revised to assure the compatibility and support that is required in an effective planning environment. We have elected to be true to our assigned mission of bringing increasing educational opportunity to a nation that desperately needs it. By franchising our courses to private institutions and by raising and retaining registration fees we have assured operating funds for essential IDCE activities at the main campus. Provinces usually provide budgets for university centres, but some provinces have virtually no money and most centres are in poverty.

We have begun a planned reduction in non-credit (remedial maths and English) courses, reducing non-credit enrolments to offset some of the growth in matriculation and degree programmes. Using collected fees we have recently hired two new staff members, though we may not be able to retain them as the university does not provide benefits such as housing because they are not a part of the regular establishment.

In 1997 an estimated 62 percent of all students in the university will be in the distance education programme, but IDCE has only six academics and two administrators on the main campus and a maximum of two persons at each centre. Funding, already sub-marginal, is expected to decrease by five percent each year for the next three years, disregarding inflation. Staffing has been cut, people who leave are not replaced, and it is difficult to remain confident of our future ability to grade papers much less revise courses. We are at a crossroads, with rapidly increasing demand and massive expectations, and no agreed-upon plan for achieving our assigned goals.

University of the Philippines Open University

Prepared by:

P. Eulalia

L. Saplala

Brief description of the programme

The University of the Philippines Open University (UPOU) is one of six autonomous units of the University of the Philippines system. All the other autonomous units operate in the residential mode; the UPOU alone of the six units is mandated to be the open and distance education institution of the University of the Philippines system. It has its own set of officials headed by a chancellor and it has its own budget. Unlike the other autonomous units, however, it does not have its own faculty. Recognising the rich human resources of the University of the Philippines system, the University of the Philippines Board of Regents in its resolution establishing the University of the Philippines Open University on February 23, 1995, directed the UPOU to draw from the expertise and experience of the University of the Philippines faculty in all the autonomous units.

In each of the autonomous units of the UP system, the UPOU has set up a School for Distance Education headed by a dean. The deans work very closely with the autonomous units, where they are located to develop programmes and courses to be delivered by distance mode by the UPOU. To guide the faculty in developing the course materials for the programmes, the Office of Academic Support and Instructional Services (OASIS) was established under the Office of the Vice-Chancellor for Academic Affairs.

Delivery of instruction is administered by the Office of the Vice-Chancellor for Student Support Services. The UPOU operates its distance education programmes through learning centres distributed throughout the country. These centres are located either in a UP campus or in a non-UP institution, including other state universities and colleges, high schools, or even in government offices which are willing to work with the UPOU as co-operating institutions. Each learning centre is under the charge of a local co-ordinator who works part-time for the UPOU, as do the locally hired tutors who may be members of the faculty of the co-operating institution.

While autonomous, the UPOU is not a stand-alone institution since it works very closely with the faculty of the other autonomous units, both in programme and course development and in the delivery of instruction.

The University of the Philippines plays a critical role in national development, particularly in the improvement of the quality of the country's human resources and the ability to bring about technological changes that would make for a globally competitive economy. However, the University of the Philippines' instructional output has been limited by the bounds of conventional instructional modes. The UPOU

can play a significant role in increasing this output by developing open and distance education programmes which employ modern communication technology for their delivery. These programmes are expected to overcome barriers to access to higher education brought about by geographical constraints, family and work-related responsibilities, and the rigid structures of conventional education.

Only two years old this year 1997, the UPOU now offers eight diploma programmes, six masters' programmes, and one Ph.D. programme. It is developing an undergraduate programme, an associate in arts. It operates 20 learning centres in the country and one abroad, and will set up several more this year in the Philippines, and possibly another one abroad. While employing less than 70 full-time staff, the UPOU has a wider reach in the country than any other educational institution, including the other autonomous units of the University of the Philippines system.

Academic programmes

Academic programmes of UPOU offered in collaboration with the different units of the autonomous universities are set out in the following table.

Programme	Collaborator
Diploma in Science Teaching	<i>College of Arts and Sciences, UP Los Banos</i>
Diploma in Agriculture	<i>College of Agriculture, UP Los Banos</i>
Diploma in Research and Development Management	<i>College of Economics and Management, UP Los Banos</i>
Diploma or Master of Social Work	<i>College of Social Work and Community Development, UP Diliman</i>
Diploma or Master in Language Studies Education	<i>College of Education, UP Diliman</i>
Diploma or Master in Social Studies Education	<i>College of Education, UP Diliman</i>
Diploma in Mathematics Teaching	<i>College of Arts and Sciences, UP Los Banos</i>
Diploma in Computer Science	<i>College of Arts and Sciences, UP Los Banos</i>
Master in Public Health	<i>College of Public Health, UP Manila</i>
Master of Hospital Administration	<i>College of Public Health, UP Manila</i>
Master of Arts in Nursing	<i>College of Nursing, UP Manila</i>
Ph.D. in Education	<i>College of Education, UP Diliman</i>

Problems encountered

Planning and managing distance education

- Since the UPOU does not have its own faculty, it must win the support and co-operation of the faculties in the different autonomous units. Because these faculties carry the full load of work in their own autonomous units, work for the UPOU may not be their priority.
- It is important to be able to identify the right co-operating institution where the learning centre is to be located. Since a local co-ordinator and local tutors will be hired for student support, care must be taken in choosing the right people who will work with the UPOU in meeting its objectives.

Implementing quality assurance

- UPOU designates a quality circle course writing team. Finding the best teacher who also knows how to write modules for distance education may be a problem. It is not easy to find the other members of the course writing team — such as the instructional designer, the reader, the editor, and so on — who possess both the qualifications and the time to devote to the development of course materials.
- The other aspect of quality assurance is in the delivery of instruction. Our students go to the learning centres about once a month or about four times in a term to attend study sessions, submit assignments, and sit for examinations. The success of these study sessions depends upon the competence of the tutors. When they are hired, they undergo training in the art of facilitating study sessions and in the content of the course that they will facilitate. While tutors are hired on the strength of their background in the area in which they will serve as tutors, there is no guarantee that they will live up to expectations.

Using and integrating media in distance education

- Print is the major medium in the UPOU's distance education courses. However, the university has begun to develop courses for on-line offering using the Internet, and video lessons for broadcast (having obtained a time slot in a major television channel), or for learning centres. The cost in terms of staffing requirements, equipment, and other production aspects is very high. Video conferencing, for example, is very expensive. High costs will continue to be a limiting factor in the use of technology.
- The plus factor in the use of technology is that, as in the case of television, its audience reach is very wide. The UPOU would be serving not only its own students, it would be helping to bring educational programmes into the homes of many Filipinos.

Instructional design and production for distance education

- The training of the faculty in course development is a continuing programme of the UPOU, but it has a limited number of people competent enough to handle the training programmes and to shepherd the faculty through the difficult task of writing course materials. As it is, development and production is still on a very

small scale, but when the number of students and the number of programmes increase, as they increase every year, the UPOU, with its limited funds, will have to find ways of coping with the volume of work.

Learning support systems

- The lack of a communication system linking the learning centres with the UPOU offices hampers the efficient delivery of student support. An audio conferencing system will soon be installed but it will not yet cover all the learning centres. A telephone network to include Internet use is being designed in co-operation with a private service provider.
- There is an acute need for library resources. Orders for foreign publications take weeks, maybe even months to arrive. Of course funding is a problem because UPOU must provide library resources not to one or two centres but to 20 or later 30 or perhaps even 50 centres.
- With the lack of communication facilities, faculty or tutors are not within easy reach of the students. To meet a tutor, students must go to the learning centre, which may not be close to home and will require the student to travel some distance. While counselling services are available, they are on a very limited scale. Aside from the lack of communication facilities, the tutors and even the learning centre co-ordinator serve only on a part-time basis and have a limited time to serve the students.

The most important issue: Planning and managing distance education

Because of its unique structure in the University of the Philippines system, the UPOU is autonomous but at the same time must work very closely with each of the other autonomous units. Administratively, this situation may give rise to rather complex procedures. Papers must be routed not only through one set of officials within an autonomous unit but as well through the other autonomous unit whose faculty are involved in distance education programmes. The UPOU finds itself therefore involved with five other sets of officials in addition to its own officials, which can become very complicated. Programmes must be approved in the autonomous unit from which they originate, and then go through the UPOU machinery. The same is true of appointments of course writers, appointments to course teams, and appointments as faculty-in-charge of courses offered by the UPOU; even the offering of courses must be synchronised with the autonomous unit colleges since faculty credit load must be cleared with their deans.

Undoubtedly, the UPOU has increased the workload of the faculty in the residential colleges by adding distance education responsibilities. Conflict therefore may arise in terms of which takes priority: work for the mother unit (the residential college), or work for the UPOU. While the faculty may be willing to put in their time for UPOU responsibilities, their administrators may believe otherwise and require that the mother units have first priority. When this happens, the UPOU of course finds itself in a difficult situation accomplishing the task to be done.

Solutions

Several approaches have been initiated to address the situation.

- To remove the issue of ownership of programmes and therefore of who can or should initiate any action with regard to programmes, the UPOU is embarking on using a different approach to programme and course development. UPOU will take a proactive stance and take the lead within and outside of the University of the Philippines system, and will seek to include those who have retired from active service in the university to help develop the programmes and instructional materials.
- Since serving in the programmes of the UPOU increases the load of the faculty in the other units, the UPOU must help the colleges of these units with funds to allow them to hire additional faculty for better distribution of workload.
- UPOU will start to hire its own faculty to serve as a core faculty for each programme. It will then have full-time academics to run its programme.

Open University of Sri Lanka

Prepared by:

B. Weerasinghe

Brief description of the programme

The Open University of Sri Lanka (OUSL) was established in 1980 to provide greater access to higher learning for the employed and adults. Today it has an enrolment of nearly 20,000 students spread across three faculties of study: Engineering Technology, Humanities and Social Studies, and Natural Science. The programmes offered vary from one-year certificates and two-year diplomas, to three- and four-year degree programmes. Students can extend the duration of study at their convenience. OUSL also offers reading for post-graduate diplomas and degrees.

The distance education strategy involves the distribution to learners of study material in print, supplemented occasionally with audio cassettes. Limited video material is available for viewing at regional centres and study centres.

Regional centres are larger resource bases than study centres in terms of physical space, facilities, and staff availability. Currently four regional centres and 16 study centres are spread across the country. Day schools offer limited face-to-face interaction between staff and students at these centres. Laboratory facilities are more concentrated at the Colombo regional centre with limited access at other regional centres.

Student performance is assessed through continuous assessments and a final exam.

Problems encountered

Planning and managing distance education

- The study programmes and their conduct are planned by individual faculties and implemented with the approval of the university Senate. Management of activities related to the conduct of programmes are done according to a master plan by the director of operations. The OUSL is currently formulating a three-year corporate plan to enhance planning and management.

Implementing quality assurance

- There has been no quality assurance system in place until recently. OUSL has now developed its own house style. The British Overseas Development Administration (ODA) Project to improve distance education at the OUSL (1996 to 1999) has both a material production and a desktop publishing component which, by its completion, would have quality assurance systems in place for study material in print. Quality assurance for audio-visual material is yet to be formulated. The Senate has approved recently a scheme to award merit points for audio-visual productions to teachers involved in their production, which would develop into a

quality assurance system. Currently, research surveys are being conducted to assess the quality of delivery mechanisms.

Using and integrating media in distance education

- Yet to achieve a satisfactory level, the use of media in distance education is limited to regular workshops conducted for academic staff, which focus on the need to enhance print material with other media components and the need for integration. One drawback seems to be the availability of staff time for the exercise.

Instructional design and production for distance education

- OUSL has developed a manual called *Distance Writing: Bridging the Gap*, which guides lesson writers in important aspects of distance writing. However, the consensus is that OUSL material could improve both in instructional design and enhancement with media. The material production component of the ODA project may, within the next three years, contribute extensively to the transformation of existing material.

Learner support systems

- A guidebook distributed to students at registration now helps to induct students to the system of distance education at the OUSL. Further activities to orient students are being planned, including a video programme for student viewing at registration. Such orientation is crucial for success, especially for younger students. Student counselling is available easily for those who desire such help. The Regional Education Service (RES), functioning under a director, looks after the student support activities in the network of regional and study centres. RES provides facilities and staff to support student registration; issue course material; facilitate day schools, laboratory work, and continuous assessments and examinations; and provide library services and dormitory facilities for overnight stays at regional centres. Currently, a conscious effort is being made to improve student support at every level of operation. However, budgetary constraints and overload of the human network imposes certain restrictions in resolving issues as they surface.
- Activities related to the printing and dispatch of material are looked after by the director of operations. A new building complex for the university press and storage of material was nearing completion in 1997. Consequently, an upgrading of services in this area should result.

The most important issue: Using and integrating media in distance education

In the beginning, the majority of teachers at OUSL came from the conventional university system, their experiences rich in the use of print and face-to-face teaching. To most, use of other media components as well as distance writing itself has been an alien experience. The initial pressure to gather together course material to launch programmes in the early phase of development, within specified deadlines, had resulted in a first cycle of course material in need of much improvement to suit the distance mode. Adopting an appropriate 'media mix' had also suffered drawbacks for

the same reasons. Instructional design and media integration were at a low ebb. This scenario is apparently not unique to OUSL. Other institutions in the region and elsewhere have undergone similar experiences during their formative years.

With nearly 15 years of experience, in 1997 the OUSL has paused and is looking back with a hope of consolidating its future. In 1993, the government of Japan donated a US\$8.5 million project to establish a state-of-the-art audio-visual production centre. Since then the OUSL has been training academic staff in the use of audio-visuals to enhance study material. Nearly 100 academic staff have now been trained at several in-house workshops of one month's duration in which project work demands the completion of a print-related audio and a video programme. A long term Japanese International Cupertino Agency (JICA) expert has been helping the training for the last four years. However, the completion rate has been affected by the heavy workloads of academic staff who after their return from the workshop mostly fail to find time for media inputs. The OUSL at present has no staff positions comparable to 'producers' and depends on input by academic staff and a competent team of technical staff to carry out productions.

The university Senate has recently approved a merit point scheme to award merit points for audio-visual productions that would be considered as career promotion exercises for academic staff. This strategy to motivate staff participation in audio-visual productions is pending University Grants Commission approval at present. Its effectiveness in overcoming the constraints mentioned earlier is yet to be proven.

A positive outcome of all these activities is the awareness and consensus among academics that media components are very desirable to enhance learning. It is a personal belief that achieving this end in itself has been extremely important.

This is only a beginning. A longer journey waits to reach the goal of an adequate level of media component production to enhance all study material at OUSL.

Open University of Sri Lanka

Post-Graduate Diploma in Education Programme

Prepared by:

G. D. Lekamge

Brief description of the programme

The OUSL started the two-year Post-Graduate Diploma in Education Programme (PGDE) in 1980 in collaboration with the Ministry of Education of Sri Lanka. The main objective of the programme is to provide professional training for graduate teachers employed in government schools, pirtvenas (community schools) private schools, and teachers' colleges. A few years ago selection to the programme was based on teachers' seniority and the marks obtained in the qualifying test. Now it is open to all graduates of recognised universities.

The curriculum of the programme consists of nine components: eight theory subjects and one practical component. Students complete four theory subjects in each academic year as shown in the following table. Teaching practice, which is the only practical component of the programme, is arranged under the supervision of master teachers and carried out for eight to 10 weeks at the end of the second academic year.

The main medium of imparting instruction is print material. They are supported by occasional day schools, tutorials and a few audio and video programmes. In 1995–96, 3,200 students were enrolled in both Parts I and II of the programme. Several studies have been carried out by OUSL academics with the view of improving the quality of material and instruction, minimising drop-out rates, and increasing the effectiveness of the programme.

PGDE Programme — Part I Courses	PGDE Programme — Part II Courses
ESP 1305 — 'Principles of Education'	ESP 2305 — 'Teaching Practice'
ESP 1306 — 'Educational Psychology'	ESP 2306 — 'Techniques of Teaching'
ESP 1307 — 'Evaluation of Educational Outcomes'	ESP 2207 — 'Curriculum, School and Society'
ESP 1308 — 'Student Adjustment and Counselling'	ESP 2208 — 'Comparative Education and Educational Problems'
	ESP 2209 — 'Educational Administration and Management'

Problems encountered

Planning and managing distance education

- Monitoring and co-ordination of master teachers activities is difficult because of the large numbers involved (250 master teachers) and their placement in dispersed locations.
- Meeting schedules is difficult: even though the PGDE is a two-year programme, academic activities last for six months in each year. Therefore marking assignments and giving eligibility have always been delayed.

Implementing quality assurance

- Because of the involvement of large numbers and pressure put on meeting eligibility schedules, it is difficult to maintain quality in marking assignments. Discrepancies among marking examiners are noted.
- Updating material is not economical.

Using and integrating media in distance education

- Audio-visual programmes are not popular among teacher trainees. They prefer face-to-face instructors to audio-visual programmes.
- Academic staff is heavily burdened with other activities (planning, management, writing, marking, and conducting day schools), so it is very difficult to find time to produce good quality audio-visual material.

Instructional design and production for distance education

- It is difficult to simplify material while maintaining the quality of teacher training.
- Academics who have worked in the conventional university system have little faith in distance methods.

Learner support systems

- Participation in day schools and tutorials has been limited due to personal difficulties and geographical barriers.
- Decentralisation of academic and other support is difficult due to lack of facilities.

The most important issue: Monitoring and co-ordinating teaching practice

The OUSL recruits nearly 250 master teachers from all over the country to conduct teaching practice during the second year of the programme. They are full-time employees of other institutions like government schools, teachers' colleges, training colleges, or technical colleges. Therefore they tend to maintain their own schedule of involvement in the distance education programme so that it will not affect their day-to-day activities. Due to the enrolment of large numbers and geographical barriers, proper monitoring and co-ordination procedures cannot be maintained. This situation has led to the following problems:

- variability in guidance;
- difficulty in meeting deadlines;
- poor quality of supervision and guidance;
- practical difficulties faced by the students; and
- negligence of the supervisory role (they tend to act as evaluators but not as supervisors).

Solutions

On the basis of recent research findings and the experience of academic staff of the Department of Education, the following procedures were launched as solutions to the above problems:

- conduct workshops and seminars for master teachers;
- conduct demonstration lessons for student teachers in small groups; and
- the significance accorded master teachers' evaluation was reduced from 50 percent to 30 percent and a decision was made to consider it a continuous assessment of teaching practice.

Suggestions were also made to allocate 10 to 15 master teachers to each academic member of the Department of Education to monitor their activities. However, many problems remain unsettled.

University of Tanzania

Prepared by:

Dr. Eginu M. Chale

Brief description of the programme

University status

The Open University of Tanzania (OUT) is a pioneering tertiary level distance education institution. It is the third public university in Tanzania, but with a difference.

The Open University of Tanzania was set up after a history of more than half a century following the adoption of open and distance education as a strategy of increasing access to education in Tanzania. It is against this experienced context that the university came to be established by Act of Parliament No. 17 of 1992. The Act became effective on March 1, 1993, and the activities of the university were inaugurated in January 1994 when the first Chancellor was installed.

The university is a forerunner not so much in adopting the multimedia distance education approach, for even conventional universities are increasingly becoming dual mode, but in having been set up constitutionally as a single mode university. Apart from being independent, it is meant to be innovative, comprehensive in its programmes, as well as exclusive in its use of distance education, as certified by the Higher Education Accreditation Council of Tanzania (1996).

Location, boundaries, and mission

The three public universities in Tanzania to date are meant to serve the whole of the United Republic of Tanzania with a total population of about 30 million (1988) spread within 245,000 square kilometres.

While efforts have been in progress to grant the Open University of Tanzania a permanent home, for expediency, it began in temporary offices let by another institution. Finding those offices eminently suitable, the university has scheduled them to become their permanent home. They are located in Msasani township in Kinondoni, which is about seven and one-half kilometres from the Dar es Salaam city centre.

Despite being headquartered in Dar es Salaam, the university's campus in practical terms needs to be conceived as the whole of Tanzania and beyond on account of its out-reach delivery provisions of distance education, namely, print, broadcast, and occasional face-to-face contact at study centres. Thus, in order to be accessed, the complete address of both the head office and the out-reach regional and study centres need to be known.

The university's objectives and functions as provided for in the Act are two pronged. On the one hand it must offer the opportunity for formal courses to youth and adults leading to pre-degree, degree, and post-graduate awards, and on the other hand, it must provide continuing (non-formal) education programmes which do not necessarily lead to awards or qualifications. It is thus open to all students 18 years and older and from all walks of life. The university serves mostly working adults with or without full-time employment where and when they wish and at a pace that suits individual needs.

Organisational structure, decision-making machinery, and academic processes

Although at face value the university's organisational structure is elusively similar to a campus-based university, in practical terms the Open University of Tanzania's organisational structure provided for a considerable administrative flexibility inherent in multimedia distance education. The organisational structure takes into account the central responsibility of providing high quality education through such processes as the development and production of course materials, technology, integration in teaching, their distribution and storage, and the delivery of back-up services. It thus has a dual structure: it is partly centralised and partly, if not largely decentralised through the establishment of regional and study centres. While this duality defines power relations between the headquarters and periphery, it also defines delivery processes: specifically, course development, media technology integration, publishing and production, pedagogy and teaching, and student services. All these processes need to be conceived as integral components. Two separate charts are provided to illustrate structural relations and processes.

Chart I

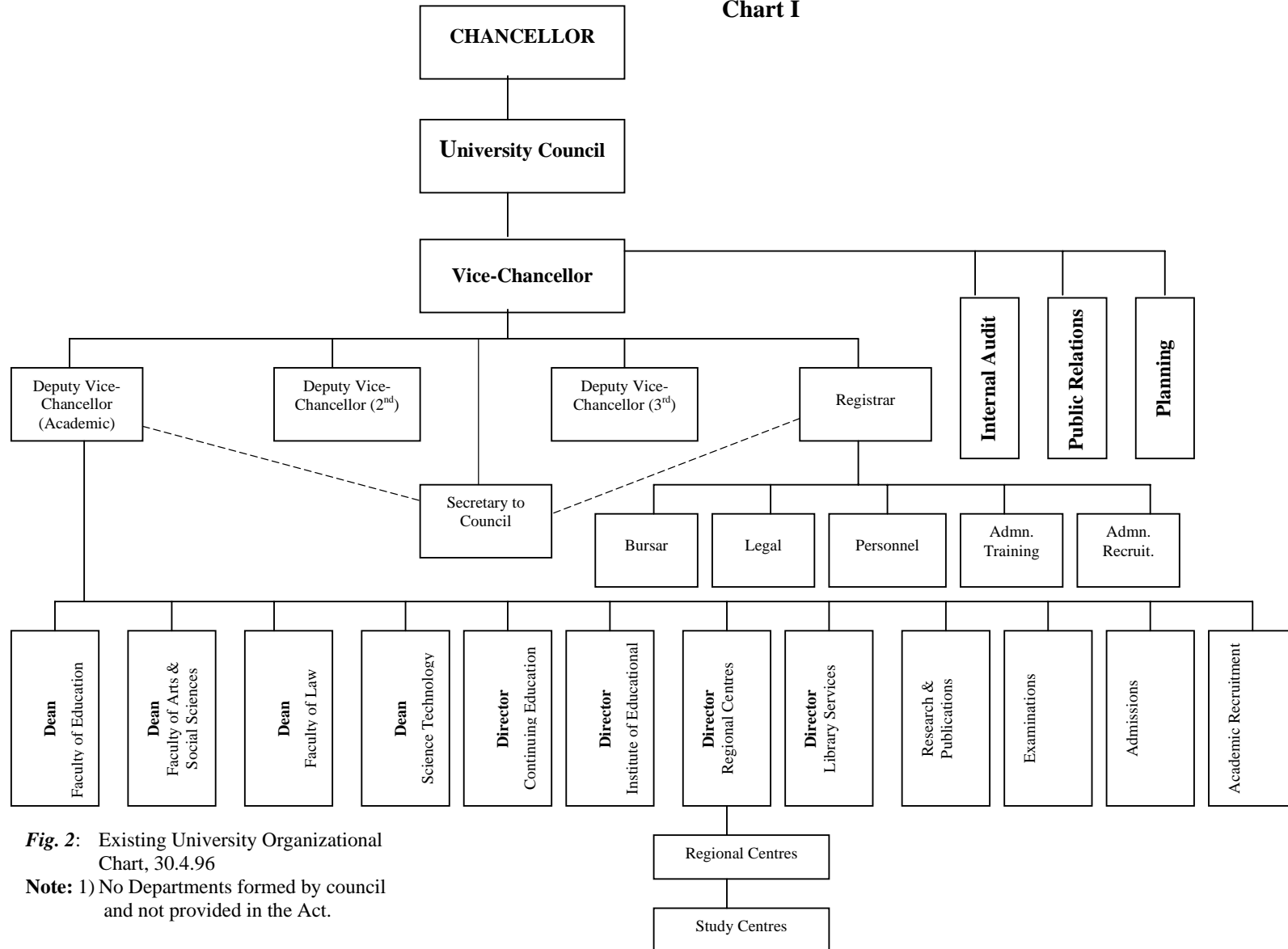


Fig. 2: Existing University Organizational Chart, 30.4.96

Note: 1) No Departments formed by council and not provided in the Act.

Chart II

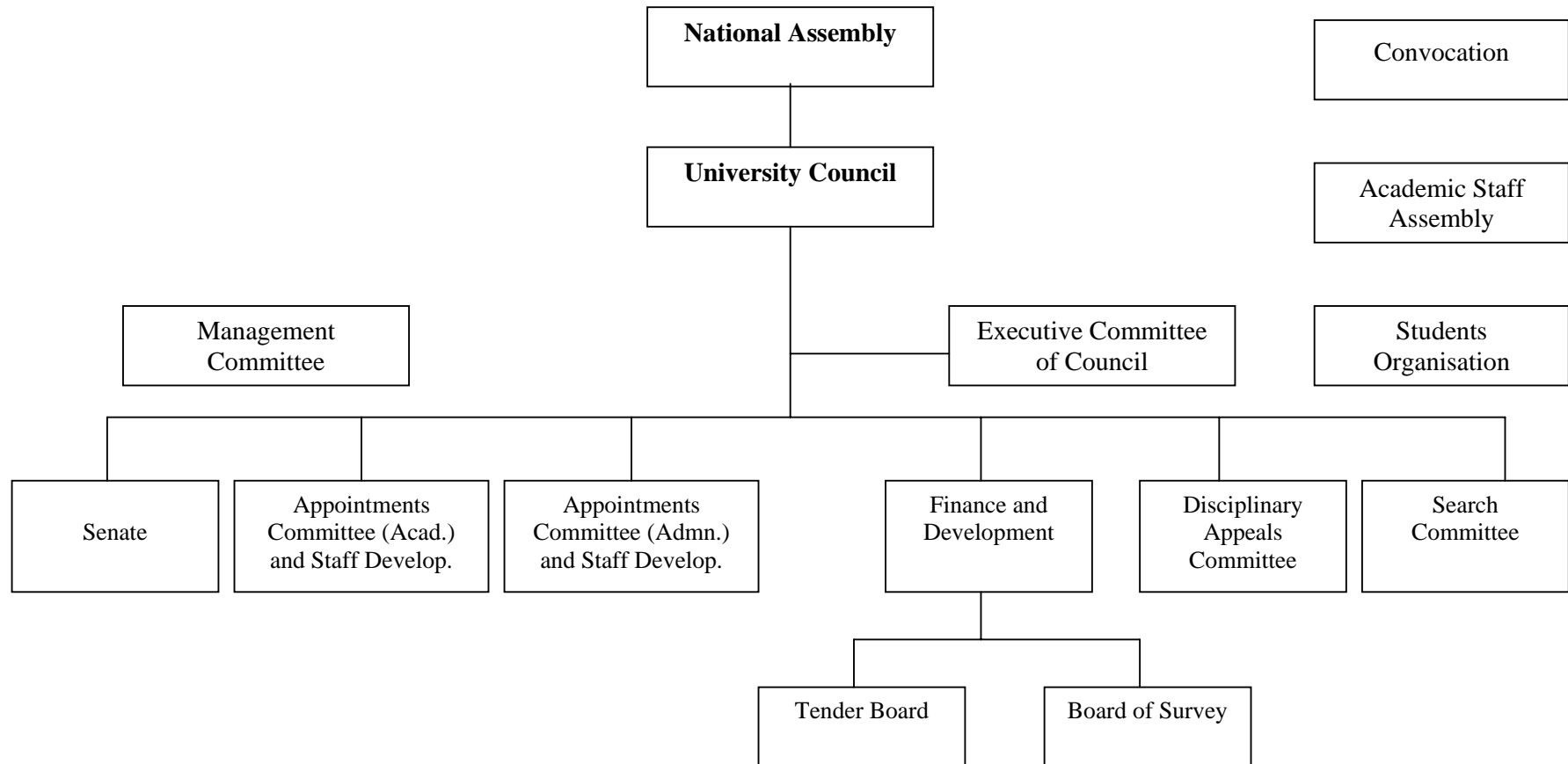


Figure 1: Existing University Decision Making Machinery April 30, 1996.

- NOTES:
- (1) No Departmental meetings are provided for in the Act now approved by Council.
 - (2) No Workers Council has been established or provided for in the Act by the Council.

The conically defined structure at the head office with the Chancellor on the apex as the head is the university administrative expediency designed to take into account of the national policies applicable to public institutions. The next in line is the Vice-Chancellor. He or she is the chief executive answerable to the Chancellor through the University Council, which is the supreme statutory institutional authority. Parallel to Council but in the academic arena, the top-most authority is the Senate. It is responsible for all academic matters. Below the dual authorities are both statutory and non-statutory organs, including the committees of the council, faculties, institutes, and boards. The Vice-Chancellor is assisted by three Deputy Vice-Chancellors and the Registrar (Finance and Administration). All of these four officers are responsible and accountable to the Vice-Chancellor.

The Open University of Tanzania's decentralised structure facilitates access to open and distance education for dispersed students who may on occasion be convened at regional or study centres. The regional centres are thus designed to co-ordinate and supervise the Open University of Tanzania's activities for students, tutors, and the public.

Staffing

With the priority given academic administration, the university is designed to operate with a proportionately small core of full-time officers (35 to date) and a large number of part-time staff (95). To accomplish its mission, objectives are made feasible through the rational use of contracted expertise and facilities of other public institutions. Currently there are five categories of full-time officers: executive, academic, administrative and management, technical, and operational or ancillary. Part-time staff, on the other hand, are of a wide range, both academic and non-academic. They are formally co-opted or contracted on a piece work basis as the need arises to perform behind-the-scene functions such as to writing study materials; reviewing them; setting assignments, tests, and examinations; and handling the production and distribution of learning materials. Thus the terms and conditions of service of the two principal categories of officers — full-time and part-time — are different in statutory terms. On the whole the qualifications prescribed by campus-based university for their staff are enforced here too.

Programmes, mode of study, and academic calendar

On its commencement in 1994 the Open University of Tanzania started with four degree programmes. The following year, three similar programmes were added and, in 1996, one more programme was brought up. Thus the Open University of Tanzania has a total of eight programmes on completion of its first three-year cycle: the Foundation Programme, Bachelor of Arts, Bachelor of Arts with Education, Bachelor of Science, Bachelor of Science with Education, Bachelor of Commerce, Bachelor of Commerce with Education, and the Bachelor of Laws. This array may appear to be quite ambitious but it is believed the range of under-graduate programmes reflect the great need for higher education in Tanzania.

For the mode of study, the degree programme is arranged in three parts, with each part corresponding to one academic year at a residential full-time university. All candidates for the Open University of Tanzania degree programme are meant to take

their courses by distance study methods. The main medium of instruction is through print materials. The main study materials for each of the subjects are called ‘units’, with each unit covering content materials equivalent to 35 one-hour lecture materials. Students are expected to spend a minimum of 70 hours studying each unit, spread over 10 weeks. Student support services are provided in the form of face-to-face teaching, audio cassettes, library services, and other learning media, laboratory exercises for science subjects organised at designated institutions, and teaching practice or field work for others as the disciplines may dictate. Theoretically, the pace of learning for Open University of Tanzania students (who are considered part-time learners) is designed at half the pace of the full-time candidates in the same course taught at the conventional universities.

To qualify for the award of the degree a candidate is supposed to have successfully completed study for the degree extending over a period of not less than six academic years. A study may take a maximum of two years on any one part provided that he or she does not exceed eight years in total. Earlier completion is possible for students who can set aside more time for their studies and whose progress from year to year is satisfactory.

In summary, the Open University of Tanzania as a national university is established to offer academic programmes to students throughout Tanzania. Its distance education method allows students all over the country to pursue higher education whenever and wherever convenient without interfering with their other personal, occupational, and vocational obligations. The institution attempts to offer an intricate and integrated distance education system that combines expertly formulated study materials and text books, 35 full-time staff and 95 part-time staff, a growing number of study centres throughout Tanzania, an exacting range of tutors as well as self-marked assignments, exams, and a multimedia programme of educational supplements. The flexible method of study effectively surmounts the obstacles of distance and time, making academic studies available to additional youth and adults hitherto prevented from studies by technical difficulties.

Problems encountered

Implementing quality assurance

The university has adopted and adapted various processes that enhance quality assurance. Alongside the development of its own study materials the university has made use of transferred materials produced by other open universities. On the other hand the development of its own materials has been accompanied by training workshops, completed either individually or by course teams. Completed draft learning materials are expediently taken to external course reviewers in place of subjecting them to trials by students.

The production of such materials also counts in one’s academic advancement as well as promotion. The university also liaises with all tertiary institutions in the country in order to benefit from their human and material resources. It has also established links with local business organisations, external universities, The Commonwealth of Learning (COL), the Association of Commonwealth Universities (ACU), Association of African Universities (AAU) and Association of Eastern and Southern African

Universities (AESAU). The Open University of Tanzania is thus keen in fostering close collaboration with relevant institutions, organisations, and agencies at regional, sub-regional, and international levels. It has built into its programmes formative and summative evaluation so that regularly the performance of the institution itself, its working tools and its products (students) are systemically determined through external examining. Thus, despite flexible entry qualifications, the university enforces vigorous quality assurance mechanisms and tight control over the standards.

Using and integrating media in distance education

Adoption of a multimedia approach is statutorily provided for in the university. Print has hitherto been the ‘master medium’ for teaching. It is supported by radio, audio cassettes, field work, and face-to-face sessions. Plans are underway to make use of television on completion of the establishment of a national network in the country. Interim plans in the regular use of the national radio broadcasting services initially thought to be free of charge has suffered a setback after its being transformed into a self-financing agency. Study centres are meant to be the focal point for student-to-student interactive learning and common listening and viewing of audio taped and video taped educational materials.

Instructional design and production for distance education

The didactic design of the university materials, in keeping with the central theory and practice of distance education, is marked with provisions of two-way communication. Their instructional design, unlike textbooks that smack of one-way instruction, reflect the dialogue and interaction processes of both teaching and learning.

Arising out of the instructional design is the convergence of two types of tutors: the course writer and the provider of student support services (that is, the course tutor). The two terms: ‘course writer’ and ‘tutor’ as used by people in higher echelons of distance education are but conceptual constructs that are mutually related. Regrettably, however, research to date in a number of distance education institutions seems to suggest that the training of the distance tutor is not given as much prominence as that of the course developer and producer.

The materials’ design and development are actuated through both individual and team approaches all the way through the planning, writing, reviewing, testing, typesetting, and editing. Their final production is done by appointed printing agencies. By and large this task is handled by both core and part-time members of the university.

Learner support systems

Provision of learner support services is embedded in the centralised and decentralised organisation of the university and staffing levels. It is designed to have a small but highly competent cadre of permanent academic, administrative, and technical staff at the headquarters and at the regional centres. Some decision-making processes should devolve to the periphery, where regional centres are used for such activities as face-to-face sessions, laboratory and field work, time-tests, and for final examinations. As discussed earlier, the centres are designed to be pivotal in the learners’ interactive activities. They constitute learning communities.

Up to the Open University of Tanzania's fourth year (1997), about 4,000 adult learners have seized the opportunity to benefit from its wide range of professional, business, and other courses at pre-degree and degree levels designed to meet the challenges of tomorrow. Post-graduate programmes are in the offing. By the end of 1998 about 1,000 students are expected to receive their degrees. Their spread is set out in the following table, which shows student distribution by: programme; year; and gender.

Programme	1994		1995		1996		1997		1998		Sub-total		Total
	M	F	M	F	M	F	M	F	M	F	M	F	
B.A.	173	15	47	4	54	7	45	5	50	5	369	36	405
B.A. Ed.	318	41	104	23	167	25	115	18	112	24	816	131	947
B.Com.	184	11	90	5	149	12	92	13	79	8	594	49	643
B.Com. Ed.	24	0	17	0	32	7	16	2	20	3	9109	12	131
LL.B.	-	-	329	26	445	36	300	33	260	35	1334	130	1464
B.Sc.	-	-	30	2	67	7	63	7	77	10	237	26	263
B.Sc. Ed.	-	-	51	10	85	8	38	8	50	13	224	39	263
Found.	-	-	-	-	194	34	182	41	189	60	565	135	700
TOTAL	699	67	668	70	1193	136	851	127	837	158	4248	558	4806

The most important issue: Learner support systems

Institutionalisation of student support systems at the university, as has been the case in a number of the Commonwealth member countries (The Open University of Tanzania (November 1993) *OUT Financial Regulations*, The Open University of Tanzania, Dar es Salaam, p. 1) has been threatened with relegation. This seems to have arisen out of an uncalled for traditional dichotomy between academic and administrative roles of such institutions. While course development, media incorporation, and the setting of assessments are taken as core academic activities, traditional student concerns such as admissions, registrations, study assistance, and the provision of learning materials and equipment as well as marking of assignments and provision of feedback tend to be probably inadvertently dismissed as of lower or less academic importance.

Instead of driving a wedge between integrated academic processes, institutions should strive to be held accountable for the whole of the academic administration. One of the most recent challenges the university has had to cope with is a daunting student:staff ratio on the average of 1:200, with correspondingly large submissions of assignments, tests, and examinations. This rise in student:staff ratio followed the government's adoption of a retrenchment policy (The Open University of Tanzania (1995) *OUT Staff Regulation*, The Open University of Tanzania, Dar es Salaam, p. 96) and a temporary freeze on employment that irrationally affected the nascent university. Faced with this challenge the Open University of Tanzania's officers put aside the accepted

dichotomy and addressed the problem related to the student record and management system with the view to improve and track the students while enrolled at the university to forestall drop-outs, withdrawals, and pushouts. In keeping with the university's commitment to excellence in teaching, scholarship, and public service, the student record management system project demonstrates the Open University of Tanzania's dedication to developing and supporting sustainable high quality courses and programmes.

Southern Africa Extension Unit

Prepared by:

M. J. Mntangi

Brief description of the programme

The Southern Africa Extension Unit (SAEU) is a distance education institution. Initiated as a project during the 1983 Commonwealth Heads of Government Meeting, the unit was set up in Dar es Salaam, Tanzania, in November 1984, to serve the educational and training needs of South African youths and adults living in exile in Eastern and Southern Africa. SAEU courses for the exiles focused on the foundation and secondary levels of education.

The SAEU took the following three transformational steps between 1990 and 1994 to cope with the repatriation of its traditional target group:

- introduced vocational courses to the students;
- extended the courses to the returnees in South Africa; and
- reviewed the future role of the target group to other refugees and non-refugees. The Local Government Councillors' Distance Training Programme is one radical outcome of the SAEU's transformation process.

The Local Government Councillors' Distance Training Programme targeted 3,700 local councillors scattered throughout mainland Tanzania. The main aim of the training was to enable the councillors to carry out their functions effectively under the newly introduced political system of multi-party democracy. The decision to appoint the SAEU to implement a distance education programme in the area of local government was prompted by the track record and the potentials of the unit in running other programmes that demanded the following features of innovative distance education institutions:

- ability to extend services to a large target group which is also widely heterogeneous and scattered across a wide area of territory;
- ability to deliver a quality-conscious course relatively quickly and at minimal costs; and
- flexibility of the institution and its training packages in building a resource base for adopting the skills and course materials developed for training other groups.

Problems encountered

Planning and managing distance education

- How to organise the training so that it could promptly reach a target group that was large, showed diverse characteristics, and was scattered over a large area of territory (four times as large as Ghana).

- How to produce course materials that could be accepted by councillors from several political parties using an unfamiliar teaching approach.
- How to get and maintain constant support for the main stakeholders of local government (that is, the central government, the local councils, individual councillors, professionals in the field of local government, and funding agencies); for example, how to solicit their co-operation by reviewing the project schedule against other divergent schedules and, in the light of long bureaucratic procedures observed, by some of the stakeholders.
- How to organise a huge training project with limited financial resources.
- How to design and make operable a learner support system making use of existing government structures.
- How to cope with difficulties of communication in the process of co-ordination and monitoring of course progress.

Implementing quality assurance

All the challenges encountered while planning and managing distance education can be considered to re-occur under the theme of implementing quality assurance. Others include:

- How to ensure that there will be maximum enrolment and minimal drop-outs.
- How to organise effective learner support services.

Using and integrating media in distance learning

- How to reconcile the inevitable bias on the print media and difficulties that would face councillors who are barely literate and those who cannot be easily reached by other simple media.
- How to get optimal benefits from face-to-face tutorials without causing excessive costs to the project.
- How the radio programmes could be utilised effectively to assist councillors; in situations in which reception was poor along the borders remote from Dar es Salaam, councillors' initial and subsequent training could not be paced.

Instructional design and production for distance education

- How to cope with the extreme range of educational levels of the target group (some councillors possess post-graduate level qualifications while others have barely completed primary education), as well as their wide age groups.
- How to make the course materials adequately interesting, resourceful, and acceptable to such a diverse target group.
- How to distribute large quantities of course materials over long distances with a relatively poor network of communication.

Learner support systems

- How to take advantage of the benefits of face-to-face tutorials but minimise unit costs in the light of the high costs of organising councillors' meetings.
- How to locate study centres for face-to-face tutorials in rural councils where some wards are several hundred kilometres apart or separated by difficult physical barriers.
- How to ensure standardised scales for assessing councillors' assignments whereby the number of part-time tutors is large (more than 300) and their professional backgrounds differ significantly.

The two most important issues

Experiences dealing with challenges in planning and managing distance education

- Two basic strategies were set up in order to deal effectively with the process of operation of the project and ensuring a smooth flow of information among the stakeholders. The first was the setting up of a Project Consultative and Advisory Committee and the other was to decentralise the management and training functions to the regional and district and council level.
- All the major activities of the project planned and carried out by the implementing agency (the SAEU), including course design, identification of course writers and editors, course pilot and review, support services and funding were presented to the Project Consultative and Advisory Committee for input and final approval. The members of the committee were drawn as follows:
 - Prime Minister's Office, as the Ministry responsible for local government and regional administration;
 - Association of Local Authorities of Tanzania (ALAT);
 - Local Government Service Commission (LGSC);
 - Local Government Training Institute, Hombolo;
 - Commonwealth Local Government Forum (CLGF); and
 - Southern Africa Extension Unit (SAEU).

The committee was expected to meet on a quarterly basis and whenever there was an issue requiring its decision. The committee facilitated the flow of information to the relevant authorities of the government as well as to the grassroots levels, including the target group.

- SAEU played a significant role in training the trainers and co-ordinators of the programme. Trainers for this programme were located at three levels — the SAEU head office, regional local government offices, and the district and council level.

As a result of the large number of trainers required (more than 300) at the regional local government and district and council levels and the extreme dispersion of their working stations across the territory, the training of trainers task was partly decentralised as a cost-cutting measure.

The SAEU conducted short, intensive training for the regional co-ordinators in national level workshops. The regional co-ordinators and tutors subsequently conducted training workshops for the council co-ordinators and tutors in their regions after reviewing with the SAEU the peculiarities of their councils.

- Management operations of the project were also decentralised on the basis of the national administrative blocks into 20 regions each co-ordinated by a regional local government officer, and 110 districts councils, each co-ordinated by a district executive director and course tutors. All the staff at regional and council levels worked on a part-time basis as project tutors as well as project co-ordinators at their own levels of operation. The district level was expected also to assist in the sustenance of the project by meeting part of the costs of the tutorial support services from the council sources.

Experiences dealing with challenges in implementing quality assurance

The following measures were taken to promote the quality of the services and materials rendered to the project:

- accommodating a wide range of experiences in the preparation of the course materials and in the organisation of support services;
- appreciating the special role of sensitisation and initial training in promoting enrolment, minimising drop-outs and contributing to the sustenance of the project;
- focusing on the course materials and support services sharply onto the target group — some councillors were at an advanced age, other councillors had a poor educational background;
- making optimum use of the pilot study — course materials and the network of support services were improved on the basis of experiences gained from the pilot study; and
- conducting close monitoring and evaluation of progress including maintaining constant liaison with the field staff.

The following three issues illustrate the approaches taken by the SAEU in promoting quality in the implementation of the project. The issues focus on experience sharing, pilot study, and sensitisation initial training — only two cases will be explained.

Experience sharing

- The main forum for sharing experiences in the project was during the meetings of the Consultative and Advisory Committee. Other opportunities for experience sharing were achieved during the editors and review workshops, training seminars for the regional local government officers, and training seminars for district and council level co-ordinators and tutors and the councillors.
- Experiences from outside Tanzania were accommodated by incorporating a member of staff from the Local Government Training Institute, Mombasa-Kenya, in a workshop that reviewed drafts of the course materials in September 1995.

- As a result of effective sensitisation, adequate inputs were made by the field staff during the pilot study. Inputs made during the pilot study provided important guidelines for improving the course materials and the support services.

Sensitisation

The processes of sensitisation and initial training were intended to achieve the following goals:

- make the relevant people clearly aware of the project objectives and demands expected of them;
- promote enrolment level; and
- minimise drop-out level.

Sensitisation was achieved through the following means:

- meetings of the Consultative Committee;
- meeting with the relevant authorities of the local and central government;
- presenting papers during meetings organised by the Association of Local Authorities of Tanzania (December 1995 and December 1996) and in forums discussing training in local government; and
- preparing and transmitting radio programmes.

Initial training

Initial training seminars and workshops were organised for the regional and district or council level project co-ordinators, tutors, and for the councillors in order to:

- sensitise them on the project; and
- give them adequate background about the course materials and the distance education approach.

Makerere University

Prepared by:

Juliana R. Bbuye and Jessica N. Aguti

Brief description of the programme

Makerere University is a dual mode university running two external degree programmes (Bachelor of Education and Bachelor of Commerce). These courses are run by the Department of Distance Education, which is part of the Institute of Adult and Continuing Education. These programmes are run in collaboration with the Faculty of Commerce (for the Bachelor of Commerce) and the School of Education (for the Bachelor of Education). The two faculties are responsible for the academic component, while the institute is responsible for the administrative component.

The External Degree Programme (EDP) is governed by the general regulations of the university. No special regulations were drawn to govern the External Degree Programme, an arrangement that has ensured the External Degree students receive the same quality of course content as internal students. However, without regulations that fully consider the needs of the external student, the programme has been affected by bureaucracy. As a result, the pace of various activities required for the smooth running of the programme has sometimes been slow.

The External Degree Programme study package consists of:

- print materials;
- face-to-face sessions;
- assignments and tests and quizzes;
- student study groups; and
- audio cassettes.

The External Degree Programme admits students every academic year and at present has 2,200 students.

For administrative purposes, the Department of Distance Education is divided into three units: Materials Development Unit, Tutoring Unit, and Support Services Unit. Each of these units is headed by a lecturer. The Department's major concern is the provision of External Degree Programmes but it is also in the process of developing short courses which include 'Skills for Research Assistant', 'Writing and Publishing', 'Marketing', and 'Income Generating Activities'. Written materials for these courses are being developed now.

Problems encountered

Planning and managing distance education

The planning and management of distance education programmes in Makerere University is greatly affected by a lack of clear policies on the running of distance education programmes. Neither are there clear policies on staff recruitment and development, student registration, or library and support services for students. Instead, all are governed by the general university regulations, disregarding the special needs of distanced education programmes and students.

Implementing quality assurance

Makerere University is a dual mode university. The university therefore feels that to ensure quality, students in the External Degree Programme must sit the same examination as internal students at the same time. This has particularly been the case for the Bachelor of Commerce programme.

Course delivery and course assessment structure for the external students is not yet satisfactory. There is a general lack of reading materials, insufficient contact with tutors, and lack of a personal tutor scheme.

The tutors participating in the External Degree Programme are lecturers in the internal programmes. They already have full loads and see the activities of the External Degree Programme as an extra load. Consequently, the assignments and tests given tend to be easy to mark and do not encourage in-depth study and research. These assignments and tests end up examining mainly surface learning.

Using and integrating media in distance education

Integration of media in the Makerere External Degree Programme has been a problem, caused by the delay in the production of print materials. A situation has therefore arisen in which the cassettes accompanying print materials are ready but, due to delays in publishing the print materials, they cannot be used. To a large extent students still depend on print materials. Radio and computer-based learning are difficult to integrate because of a scarcity of resources.

Instructional design and production for distance education

The process of instructional design and production has been very slow. The causes of this slackness are:

- inadequate staffing;
- lecturers who are supposed to develop and review materials are busy;
- lack of sub-editors to assist the principal editor;
- delays at the publishing stage due particularly to the long process of procuring funds; and
- delays by the publishing firms.

Learner support systems

There is no clear learner support system in the External Degree Programme. The programme began with no clear system and, due to a lack of resources, is evolving very slowly. Student study centres are being started in the different regions as a response to student demands rather than as part of a clear scheme.

The two most important issues: Developing a learner support system and developing study materials

Developing a learner support system

Learner support systems in Makerere Distance Education Programmes have not yet been fully developed. At the planning stage of the programme the role of the extramural centres, for example, which were supposed to play a vital role in the support system, was not fully defined. As a result, administrators, tutors, and students of the programme have failed to utilise fully the potential offered by these centres. Support is therefore very much centralised despite the scattered nature of students, who come from all over Uganda.

The scarcity of funds has made the personal tutor arrangement difficult to implement. The radio and television services have not yet been effectively used because many of the students, especially those who live in remote areas, cannot afford the accessories. It has also been difficult to use a multimedia approach to provide student support, largely due to inadequate staff and funds. For example, counselling on the telephone is almost non-existent since it is expensive and telephone services are not available in most remote areas. Students are therefore left to study mostly on their own with little support.

Support available to students

Learner support in Makerere University is provided in a variety of ways.

- On admission, students receive information about the programme through the prospectus and the study guide. They receive two weeks of orientation, which enables them to receive more information concerning the programme, guidance on subject combinations and study skills, and to interact with each other. It is also mostly during that orientation week that they form their study groups.
- The university main library and all off-campus library branches offer library services. The department also operates a small collection of rare books.
- Study groups have also been started, are located in existing education institutions, and meet mostly on weekends.
- Other groups meet in the evenings on campus to solicit the services of tutors.
- Hand-outs and other references are provided to students.
- Occasional visits are made by members of the Department of Distance Education to some of the study centres to meet with the students and to obtain feedback on their progress. The visits assist the department in the planning of materials distribution and preparation for face-to-face sessions.

Student study groups

Mainly because of a lack of study materials and the problems associated with remoteness from the centre, students have organised themselves into strong study groups. The study groups meet mostly on weekends to review previous work and discuss difficult assignments. Ongoing research has shown that groups are mainly found in areas where there is a concentration of students, not necessarily at the extramural centres. The radius of these clusters is as great as 50 kilometres so the department is encouraging students to form groups based on these clusters. This will assist the department to provide services to the students by establishing convenient centres where materials can be kept and students can go to read. These may later be developed into resource centres.

Personal tutors

Students have expressed their need for personal tutors. The department has also realised the urgency of establishing a strong network of personal tutors who will assist students in academic and socially related problems. Centralised support services are insufficient to cater to the large number of students. The total population of students on the External Degree Programme is more than 2,000.

The personal tutor scheme, it should be noted, has not been implemented in Makerere because of a lack of funds. A cheaper scheme can possibly be designed, for example, one in which the principals of teacher training colleges and qualified staff in other institutions and banks can be involved on a part-time basis in assisting students. They would, however, need training in handling distance learners.

Developing study materials for the External Degree Programme

The External Degree Programme was launched in 1991 and at that time no study materials had been developed. Instead, through financial assistance of The Commonwealth of Learning (COL), Makerere was able to purchase written materials from Nairobi University and from the Open College UK. This acquisition of study materials was a 'stop gap measure' that enabled the programme to take off.

Purchasing materials from other institutions is good as a 'stop gap measure' but in the long run it has proven too expensive. The department has not been able to continue doing this. Also, courses can be deceptively similar on the surface, giving the impression that they are identical when there could actually be deep set differences. Where materials are purchased, there may be need for the institution buying these materials to develop supplementary materials that would ensure the students needs are fully met.

In the External Degree Programme, written materials were viewed as the core of the learning package, so to ensure that Makerere University produces its own materials COL funded the initial writers' workshops. Since then, the Department of Distance Education has run a number of other writers' workshops. As a result a total of 40 units are at different stages of development with only five published so far. Clearly, this is far below the needs of the External Degree Programme and so the shortage of study materials is still acute.

To deal with this, the department has chosen a number of options, as follows.

Handouts

In nearly all the subjects, but more especially in subjects for which no written materials have been developed, students are given handouts. These may be handouts developed by the lecturers but which are not written in the distance education mode or they may be extracts from texts. Handouts are important but should be seen as either another 'stop gap measure' or supplementary reading material. To meet the needs of the distance learner it is still imperative that materials written for the distance learner be developed.

Face-to-face sessions

Face-to-face sessions should be part of the study package but, because of inadequate study materials, a lot of time is allotted to them, which is expensive to both the students and the department. Also, there is the danger of the External Degree Programme students beginning to rely entirely on these sessions even in subjects in which study materials are available.

Student study groups

Student study groups are also part of the study package but, like the face-to-face sessions, they have taken on a different meaning, particularly in the Bachelor of Commerce programme, where the shortage of materials is worse. The students now rely so much on the student study groups that sometimes meetings are held daily as though they were a conventional evening programme.

Conclusion

In any distance education programme, there is no replacement for study materials. Ideally, they should be developed even before the programme is launched and, where this is not possible, production should be guaranteed. If materials must be purchased, then care is needed in the selection and, where necessary, supplementary materials should be developed.

University of Lincolnshire and Humberside

Prepared by:

David Lippiatt

Brief description of the programme

The University of Lincolnshire and Humberside has some 13,000 students attending full-time and part-time courses on-campus but, since 1993, the university has been franchising some courses off-campus. In order to promote assurance of quality in these courses, the university supplies comprehensive sets of materials to support lecturers in other institutions. Building on this experience in materials provision, in 1994 the university began to develop distance education materials for 'top-up' courses that would enable students with a diploma level qualification to study for an honours degree.

Following the well-researched identification of a potential market, academic design of the course was quickly followed by design of the form that such distance education provision would take. Now in 1997 the course is up and running with some 800 students using the materials through a network of approved centres both in the United Kingdom and overseas.

Problems encountered

Planning and managing distance education

- Although there is now widespread experience of matters relating to the planning and management of distance education, in fact, given the organisational structures within which we originally undertook this development, with advisors in one department and producers in another, the early stages of the project were fraught with difficulties. Part of the difficulty resided in the fact that directions were being given at an awkward distance; serious progress only began when 'management by leadership' was introduced and a managing editor was given direct responsibility for 'producing the goods'.

Implementing quality assurance

- In line with commonly understood standards and procedures, a quality assurance system had been created but to some extent this was theoretical, and experience showed the importance of drawing up such procedures in the light of local capabilities and particular market requirements. There is no point in designing idealised quality systems which in practical fact do not fit with customer requirements nor institutional capabilities.

Using and integrating media in distance education

- Given the academic design of the course in business and management, some ready-made materials were available in a variety of media, but their principal weakness was that they could only have been adapted to meet the requirements of the course at uneconomical expense. There was the requirement that ‘distant students’ should be receiving university brand materials not substitute materials however good they might be. Print-based technology was adopted because it was manageable by both the supplier and consumer with the expectation that use of further media would be adopted at a later point as the need arose and as economic returns justified its use.

Instructional design and production for distance education

- Materials were developed for each unit of the course in the form of study guides centred on published core texts. This model permitted lecturers to depend on the texts for conveying content with motivating and explanatory text of their own in the study guides. Local arrangements with a book retailer who in turn made arrangements with publishers spread the cost of assuring access to large supplies of textbooks and ensured sufficient ‘buffer’ to guarantee at least six months’ life ahead for any one unit. The book retailer got the business and the university had assurance of a safe life for its units.

Learner support systems

- The best of materials do not support themselves so that local tutorial arrangements with approved centres were, and are, vital to the success of this distance education provision. Following the development of staff in centres, the maintenance and cultivation by the university of good relations with centre staff is as important a part of the process as the direct relation they have with the student.

The most important issue: Developing learning materials

The most important issue is difficult to isolate, but time and time again the difficulties encountered in the development of materials are purely the result of rushing things at the planning stages. It is not that the problems are overlooked or unforeseen at the outset but that pressures to start delivering the goods force the course developer to keep on using up safety spaces built into the project plan. This is not so much the result of not knowing how long it is likely to take to carry out a particular task nor of making a mistake in allowing for its duration. In fact, it is ironically the case that since the originally scheduled project is working, other commitments come to be made which, in effect, overlay the first plan. Success might breed success but it also breeds the pressure to succeed even more.

From one management point of view, this is understandable because few of us are working within fixed project time scales. We are frequently working within very fluid markets where flexible responses are required — reallocating resources on an almost daily basis so that project management is about redefining projects every day. The difficulty is to keep on managing things in such a way as to maintain confidence by fulfilling commitments made at one point while constantly readjusting dates to accommodate new projects.

But there are limits beyond which quality is in danger of being compromised and so, from another management point of view, one of the most important issues is to recognise those limits and refuse to cross them.

Napier University

Prepared by:

Sally Anderson

Brief description of the programme

Napier is one of the largest universities in Scotland, with more than 11,000 students. The university is organised into five faculties: Arts and Social Science, Engineering, Health Studies, Science, and the Napier Business School. The university takes its name from John Napier, inventor of logarithms, who was born in the Tower of Merchiston in 1550. The Tower is now an integral part of the Merchiston campus.

From its early days as the Napier College of Science and Technology, which opened in 1964, Napier has grown steadily, in 1974 merging with another institution to become the Napier College of Commerce and Technology and later becoming a polytechnic. In 1992, in recognition of its achievements, the polytechnic was given consent to adopt the title Napier University.

Delivery in Mauritius

Napier University is offering a number of courses in Mauritius in areas such as Economics, Computer Studies, and Management. These courses cover a range of levels, including the higher national certificate, a full Bachelor of Arts (Honours) in Economics, and a post-graduate diploma in computer studies.

It is an important feature of all Napier's flexible learning projects that the courses are owned and delivered by the relevant academic department, rather than by a central unit. There is, however, a central support team who work with the academic department by providing advice, editorial and production assistance, project management expertise and staff development and training where required. Quality assurance procedures for distant courses follow the same route within the university as does any conventionally delivered course. The media used for delivering flexible learning in the university are varied, and are chosen with careful investigation of what is available to students. In the case of Mauritius, print-based delivery was the most accessible, with some limited computer and software usage.

For students at such a distance, with cultural and language differences from the delivery institution, support was of some concern, and a comprehensive strategy was developed.

- To establish a local base, we work with the Ministry of Education and related organisations (such as the National Computing and Information Technology Resource Centre) and for each course a local administrator acts as a liaison with Napier.

- Local tutors are recruited in accordance with requirements laid down by Napier, and they provide frequent and regular tutorials throughout the year. E-mail and fax allow local tutors and the local administrator relatively easy contact with Napier staff in Scotland.
- Napier staff travel to Mauritius at least twice per academic year. Not only do they work with students there, more importantly, they provide training and assistance to local tutors.
- All study materials are scrutinised by the project consultant, who is both a member of Napier staff and a Mauritian national, to ensure their applicability culturally and with regard to language level.

So, the course runs as follows: students attend a summer school at which they meet local tutors and Napier staff. This is an opportunity for students to explore exactly how they will study and develop some study skills appropriate for flexible learning, as well as to cover some initial content. They then study by means of flexible learning study materials prepared and supplied by Napier, with regular tutorials and opportunities to use computer facilities. A winter school with Napier staff and local tutors allows examination revision and clarification of problems. Formative assessment is done by local tutors with Napier moderating a random selection of written assignments, and final assessment is set and marked by Napier staff.

This model has proved very effective and a number of cohorts have graduated successfully.

The University of Zambia

Prepared by:

Richard Siaciwena

Brief description of the programme

The University of Zambia is a conventional university that has been operating a comparatively small scale distance education programme since it was established in 1966. Distance student enrolments vary from year to year. In the 1995–96 academic year, for example, 381 distance students (326 male and 55 female) were enrolled, constituting 9.8 percent of the total university enrolment of 3,980 (that is, full-time, part-time, and distance studies).

There are 68 first- and second-year level semester courses offered to distance students by the schools (faculties) of Education, Humanities and Social Sciences, and Natural Sciences. These lead to the award of the Bachelor of Arts, Bachelor of Arts with Education, and the Diploma in Adult Education. However, students who enrol for the Bachelor of Arts and the Bachelor of Arts with Education degree programmes must transfer to full-time study for their final two years. The Diploma in Adult Education can be completed entirely by distance education.

Problems encountered

Planning and managing distance education

- In the past the distance education programme has suffered from the lack of a clear and comprehensive policy, inadequate funding, and long bureaucratic procedures through which matters relating to distance education are referred to the university's policy- and decision-making bodies. An additional problem is that the Directorate of Distance Education does not always find it easy to establish its authority over the overworked teaching staff, who are inclined to regard requests and instructions from the directorate as carrying less weight than those given by their teaching departments relating to internal teaching.

Implementing quality assurance

- There is neither a policy nor mechanisms or strategies for implementing or assessing quality in distance education, a phenomenon that has made distance education more variable in quality than should be the case. In the past, this has been compounded by the lack of trained staff (in distance education) and the difficulty in retraining teaching staff so that they become more proficient in distance teaching.

Using and integrating media in distance education

- Print materials are the predominant medium of instruction complemented by a four-week intensive face-to-face teaching programme. The comparatively under-developed telecommunications technologies make it difficult to use and integrate other media in distance education, resulting in a weak two-way communication system.

Instructional design and production for distance education

- There is no uniform policy or practice on instructional design or course presentation and there is very little input into course design from experts and professionals in the Directorate of Distance Education. The course production capacity of the Directorate of Distance Education is very limited and, therefore, it is not capable of supporting and facilitating efficient production and speedy delivery of study materials to the learners.

Learner support systems

- Some of the support services offered by different departments and units are not fully integrated into the distance education system as a whole and the Directorate of Distance Education can exercise no sanction for any failure on the part of various providers to offer efficient support services to distance learners. Most of the support services are centralised and the comparatively under-developed telecommunications infrastructure limits the range of learner-support services and the media through which they are provided.

The most important issue: Planning and managing distance education

Some policy and organisational changes instituted in the 1990s have helped to minimise a number of problems that, over the years, have affected the planning and management of the distance education programme.

- Unlike the report on the establishment of a university in Zambia which provided broad aims, the University of Zambia's *Strategic Plan: 1994–98* offers more specific and more comprehensive policy provisions for the development of distance education.
- Distance education, once part of the Centre for Continuing Education, was transformed into an autonomous Directorate of Distance Education in 1994. Its director, like deans of schools and faculties, is accountable to the Vice-Chancellor, and is a member of the Senate and its various committees. A Senate Committee on Distance Education, chaired by the Deputy Vice-Chancellor, was established as part of the new structure of distance education. Its main functions are to consider and formulate policy on distance education and recommend to the Senate, rules and regulations governing the distance education programme.

Solutions

These changes have not only improved the decision-making process but have also enhanced the status and visibility of distance education in the university.

- Distance teaching staff are now paid allowances for: all work on study materials prepared; every hour of lectures and tutorials during the residential school; and for

each assignment and examination script marked. Although the current levels of allowances are not commensurate with the distance teaching responsibilities of the affected staff, they have had, in general, a positive effect on the running of the distance education programme.

- It has been realised that it is important and necessary for the Director of Distance Education and staff to meet regularly with distance education staff. Unlike Boards of Studies meetings (which also discuss matters relating to distance teaching) meetings with the distance teaching staff are more focused. Decisions or recommendations from these meetings can be referred direct to the Senate or to the Senate Committee on Distance Education.

Perhaps one important lesson to be learned from the experience of the University of Zambia is that, in a dual mode university, the administrative and financial autonomy as well as various incentives for teaching staff are crucially important. A lot more has yet to be done in these areas at the University of Zambia.

Characteristics of Open and Distance Learning

separation of teacher and learner

institutional accreditation

use of mixed-media courseware

two-way communication

possibility of face-to-face meetings

use of industrialised processes



Distinguishing the Types of Open and Distance Learning

correspondence
education

home study

independent study

external studies

continuing education

distance teaching

self-instruction

adult education

technology-based or
mediated education

learner-centred
education

open learning

open access

flexible learning

distributed learning



Scenarios for Open and Distance Learning

	Same Time	Different Time
Same Place	1	2
Different Place	3	4



Barriers that Open and Distance Learning Overcome



physical distance

time or scheduling problems

limited number of places available

low or dispersed enrolments

limited number of teachers available

cultural, religious and political considerations



A Systems Approach to Open and Distance Learning

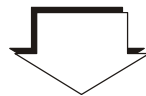
analyse



design



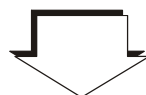
develop



implement



evaluate



revise

Functions of Open and Distance Learning

- obtaining and managing resources
- developing or acquiring programmes
- recruiting and promoting
- producing, storing and disseminating materials
- enrolling and registering
- delivering programmes and courses
- providing learner support
- examining, crediting and granting credentials
- evaluating and revising processes and programmes
- training and developing staff



Educational Objectives of Government and Society

- adult literacy and primary education to enhance social mobility of poor
- graduates from secondary schools for technical and administrative functions
- graduates from higher education for managerial and teaching jobs in both the private and public sectors



Bases of Political Support for Open and Distance Learning

meeting training needs

equitable access

response to unmet demand

educational reform

reduce threat of student protest



Types of Power

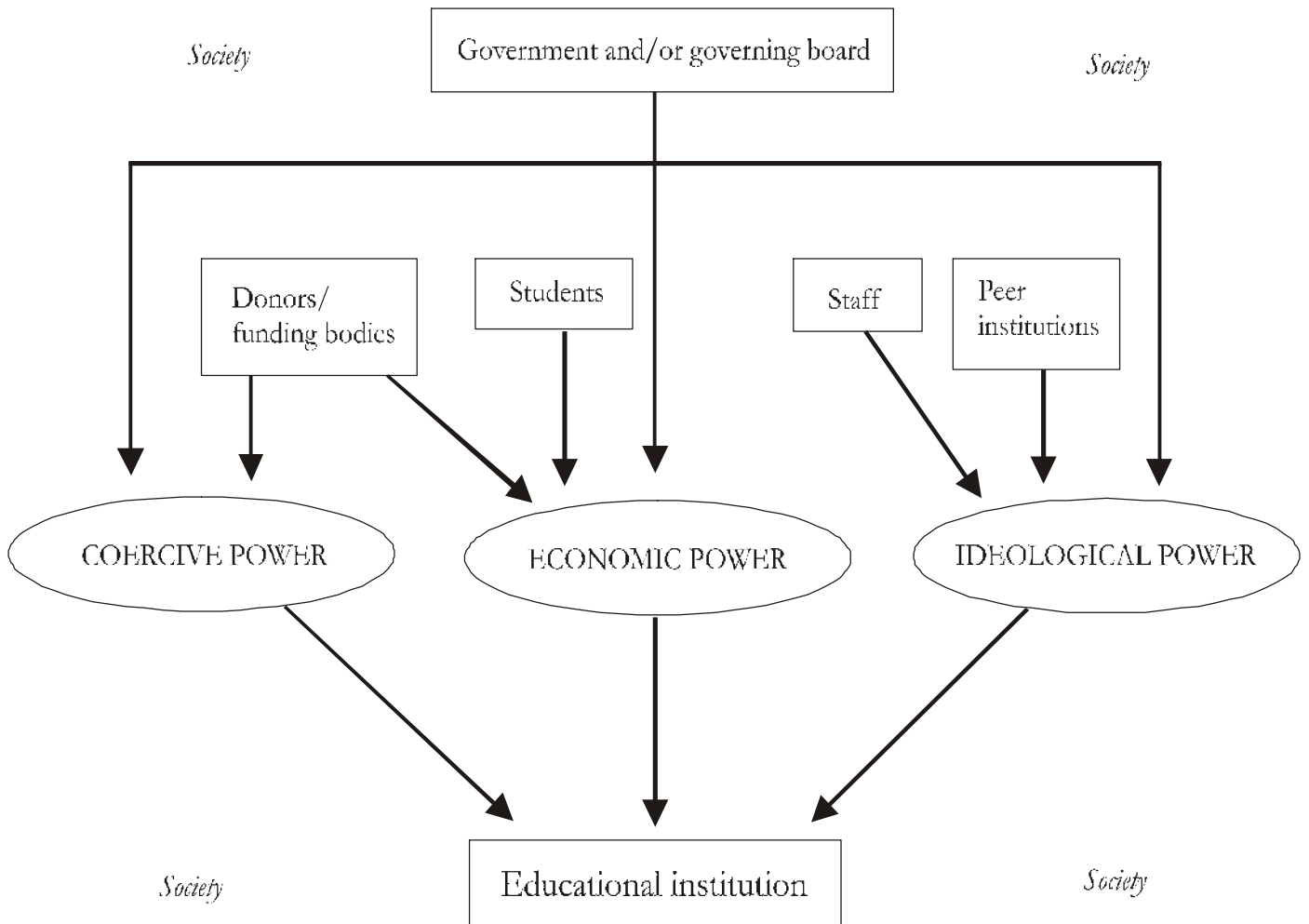
coercion

funding

policy



Political Power and Institutions



Sources of Funding

government funding

tuition fees

ancillary operations

interest on short-term investments

donations and endowment funds

capital funding



Motives for Collaboration

economic efficiency

technological

equity and access

quality

moral and philosophical

political



Evaluating Collaborative Opportunities

- better use of resources?
- improve quality of learning materials?
- increase educational opportunities?
- useful response to political pressures?
- effective response to perceived need for change?



Risks and Benefits of Collaboration

LOW RISK

MODEST BENEFITS

Sharing information

Exchanging information

Exchanging advisers and consultants

Collaborative staff training

Accepting each other's students

Acquiring and/or exchanging external materials

Collaborating on evaluating external materials

Collaborating on the adaptation of materials

Cooperating on the development of related course units

Establishing credit transfer agreements

Creating a common learning system (consortia)

HIGH RISK

MAJOR BENEFITS

Problems in Course Transfer

- **administrative**
 - availability of suitable materials
 - copyright and ownership of materials
 - pricing policies
- **academic**
 - appropriateness of language, subject
 - appropriateness of credit weighting
 - fit with existing programme structure
 - reflection of different culture
 - appropriateness of academic level
 - congruity with delivery system
- **sociocultural**
 - validity and cultural relevance
 - whose history counts?
 - appropriateness of pedagogy



Problems in Co-production

who should produce what?



to what standard?



learner entry requirements

unfamiliar media

academic and administrative procedures, control

obtaining permissions to adapt existing material

different audiences

targets for recruiting

maintaining collaborative decision making

specifying in sufficient detail

staying within budget

Sustaining Effective Collaboration

between institutions not individuals

use own funding resources where possible

use own human resources

explore local and regional potential

redress inequities in flow

emphasise training the trainers

use distance communication methods for
knowledge transfer

promote staff exchange



Quality Assurance

Why the concern with quality assurance?

What do we mean by 'quality'?

What is involved in assuring quality?

Quality Assurance Checklist

- quality policy and plan
- specification of standards
- identifying critical functions
- documentation
- staff involvement
- monitoring
- training
- costs

Uses of Open and Distance Learning

basic education

teacher training

university level

non-formal education

technical and vocational training



Structures of Open and Distance Learning

- single mode or free-standing

- single purpose
- multi-purpose



- department within existing teaching institution

- subject-oriented department
- distance education department



- co-operative arrangements

- national co-operative structures
- international co-operative structures



- hybrids

Factors in Choosing a Structure

the scale of the educational need

educational purpose

resources available

degree of autonomy and control



Characteristics of Open and Distance Learning

- concerned with democratisation of education
- dropped or lowered entrance requirements
- entrants have lower qualifications
- use mix of technologies and media
- typically supported by part-time staff
- frequently require collaboration with other programmes
- tend to need larger administrative bodies
- require open, flexible and innovative approaches to management



Issues for Managers of Open and Distance Learning Programmes

systems thinking

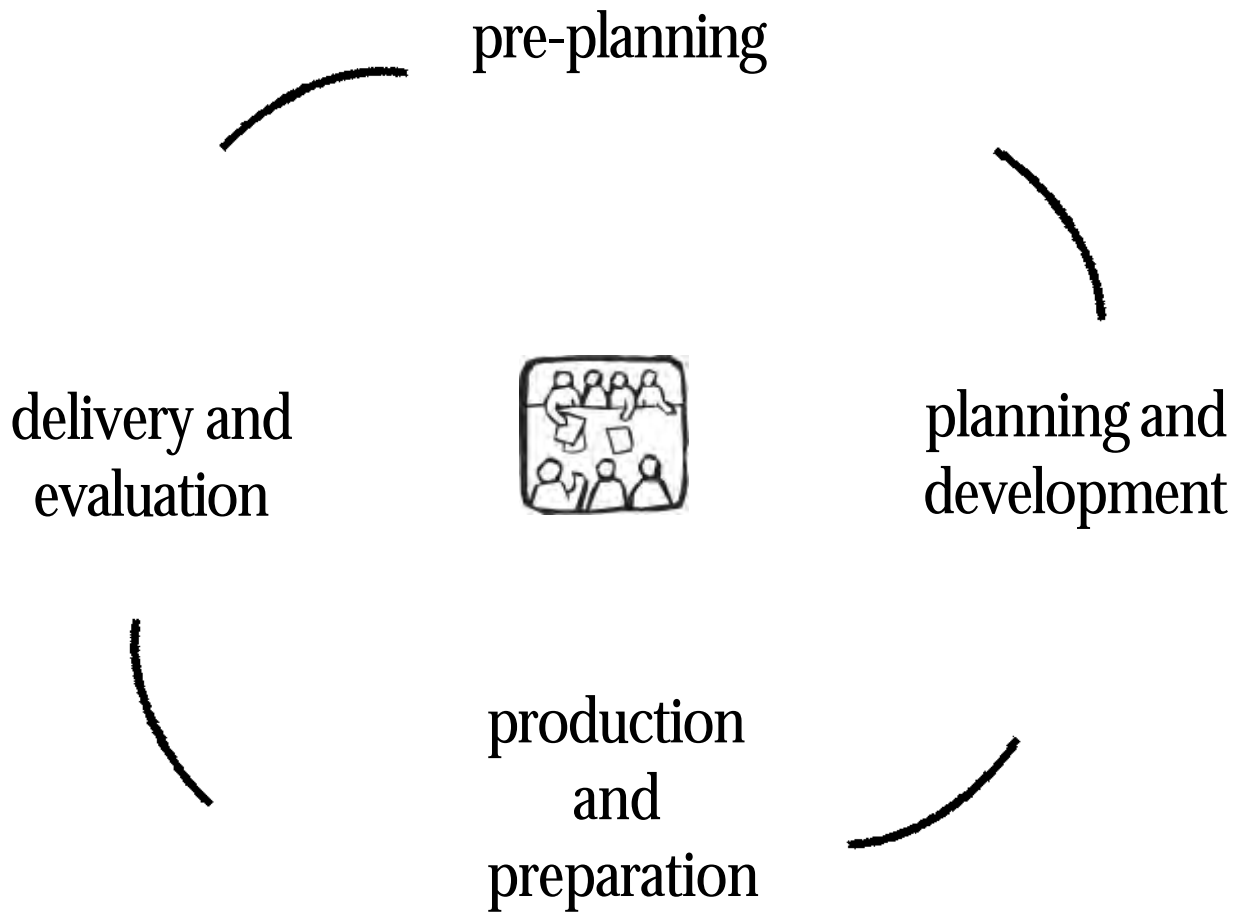
staffing

teamwork

quality assurance



A Cyclical Approach to Management



The Staffing Mix



EDUCATIONAL STAFF

subject specialists
specialists in materials production
specialists in tutoring and counselling
tutors
broadcasting producers
research workers and evaluators



MATERIALS PRODUCTION STAFF

printers
copy editors
graphic designers
broadcasting technicians
typists and word processing clerks
desktop publishing specialists



ADMINISTRATIVE STAFF

administrators and managers
personnel staff
financial staff
records clerks
secretaries and typists
warehousing and dispatch staff
messengers, drivers and janitors

Working Conditions for Staff at a Distance

part-time

short-term contracts

no regular face-to-face contact with supervisors

roles diffuse and ill-defined

often feel isolated and invisible



Effective Relations with Distant Staff

- clear role descriptions
- clear jurisdictions and responsibilities
- clear policy directives
- updating policies and procedures
- thorough induction
- training
- effective communication
- face-to-face meetings
- frequent performance review and monitoring
- accurate and efficient records
- opportunities for input
- leeway in decision making
- positive attitude to complaints



Factors in Effective Teamwork

- time
- experience and maturity
- knowledge
- skills
- shared respect
- openness and flexibility
- desire to learn, curiosity
- commitment to process
- support and encouragement
- sensitivity
- trust
- attention to the use of power
- determination and energy



Advantages of Regional Networks

localised, personalised service

strengthened local identity

marketing tool

reduced turnaround time

enhanced support

sites for meetings and tutorials

direct feedback on program



Essential Features of Quality Assurance

checking and monitoring

correcting mistakes

changing system if necessary



Evaluating Program Performance

measuring

comparing

correcting



Steps in Preparing a Budget

- review and adjust strategic plan
- obtain data on forecast enrolments and other projected costs
- estimate revenues – for different scenarios
- develop expenditure estimates within parameters
- compile cost centre budgets
- conduct final review, re-allocations
- obtain final approval from governing body
- load budget into financial information system for subsequent comparison with actual revenues and expenses
- develop management report protocols
- set up monthly comparison procedures

Costs Terminology

- cost
- total cost
- cost unit
- cost centre
- period of account
- financial year
- recurrent costs
- one-time costs
- revenue cost or operating cost
- capital cost
- capital ex revenue budget



Concepts of Cost Analysis

- cost
- direct cost
- indirect cost
- overhead cost
- apportioning
- fixed cost
- variable cost
- marginal cost
- incremental cost
- relevant range
- stepped fixed cost
- overhead
- full absorption costing
- activity costing exercise



Cost Control Techniques

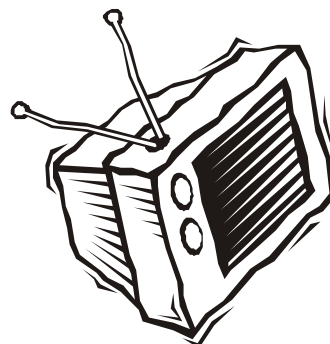
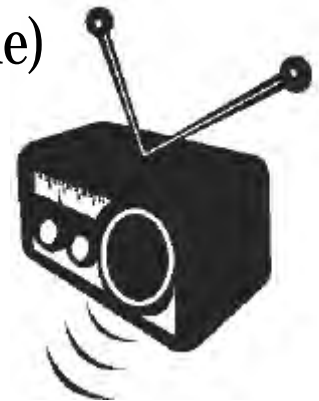
- cash handling
- accounts receivable
- inventory
- accounts payable
- short-term investments
- contract work
- tendering
- review and control programmes



Technologies Used in Open and Distance Learning



- print (mechanical and electronic)
- radio (one-way, interactive and two-way)
- audio cassettes
- telephone teaching, including audio conferencing
- audio graphics
- television (broadcast, satellite and cable)
- video cassettes
- video conferencing
- computer-mediated communication
- computer-based learning
- video discs
- cd-rom
- multimedia
- integrated services digital network or ISDN



The ACTIONS Model

A Access

C Costs

T Teaching functions

I Interaction and user-friendliness

O Organisation

N Novelty

S Speed

Course Blueprint Outline

programme-related details

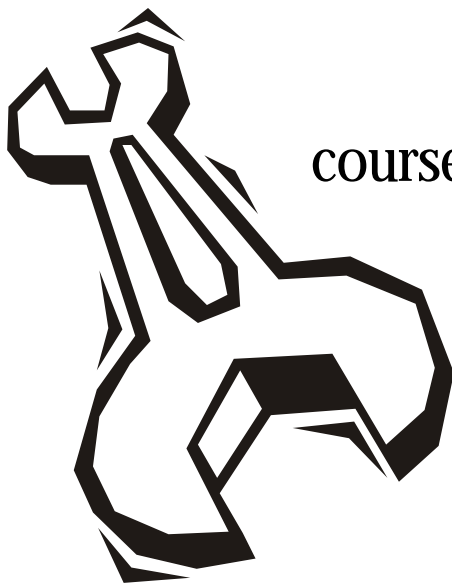
course package components

development and production schedule

content and pedagogy

delivery plan

course budget



Factors in Copyright Costs

end product's use

geographical distribution

amount of material

size of print run

period of availability

type of organisation holding copyright

medium of reproduction



Stages of the Course Production Process

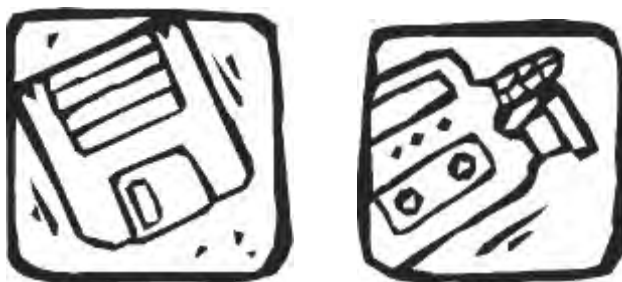
generating text and illustrations

designing the materials

preparing materials for the printer

printing the materials

finishing the materials



Problems Distance Learners Face

- isolation
- difficulty organising studies, study space
- difficulty finding sufficient time to study
- difficulty balancing work, study and family
- lack of motivation
- lack of resources and equipment
- poor study techniques



Special Needs of Distance Learners

information

contact

institutional identity

advice on how to study



Stages in the Learning Cycle

pre-enrolment

enrolment and starting study

during study

completion and graduation



Dimensions of Tutorial Models

synchrony



asynchrony

tutor–learner
interaction



learner–learner
interaction

access from
home



access through
study centre



Types of Non-Instructional Support

admissions and registration

marketing

facilitating applications

making offers

registering learners

matching learners with courses

counselling

financial

family

motivation

time

balancing commitments

physical barriers



administrative

office hours

name of tutor

who to contact with problems

deadlines

examination dates

finance

scholarships and loans

The Context of Staffing and Training

social context and clientele

generation

financial considerations

institutional pressures

societal changes

national programmes

changing technologies



Staffing Needs

- leadership
- administration
- teaching and course development
 - course developer and subject matter specialist
 - course developer and instructional designer
 - course team leader
- teaching, tutoring and student support
- logistics co-ordination
- research and evaluation



Training Needs in Open and Distance Learning

- Why is training needed?
- When is training needed?
- What kinds of staff need training?
- What problems do organisations face when implementing staff training?
- How closely is training linked to the strategic goals of your organisation?
- What are the steps in implementing a training programme?
- What modes of training are available?
- How is a training needs analysis conducted?
- What needs to be done to make training immediately useful on the job?
- How can training be evaluated?



Aspects of Quality in Open and Distance Learning

PRODUCTS AND OUTPUTS

- courses and materials
- graduates and completers
- examination pass rates



PROCESSES

- learning and teaching
- advising and tracking learners
- record keeping
- co-ordinating groups of external writers

PRODUCTION AND DELIVERY SYSTEMS

- course production
- print production
- scheduling and progress monitoring
- warehousing and stock control
- dispatching materials
- transmission of broadcast programmes



PHILOSOPHY OR ETHOS

- policy statements
- staff attitudes
- management and training of staff
- motto or slogan
- images and messages to public

Performance Indicators

AUDIENCE

institutions

government

public

learners

industry

research
councils

PURPOSE

internal management

comparison

marketing

evaluation

accountability

policy and planning

allocation of resources

funding

investment in research

human resources planning

accountability

institution choice

research funding

graduate employment

distribution of funds

Characteristics of Good Indicators

relevant

can be updated

based on reliable figures

understandable

valid

(measure what needs to be measured)



Research for System Evaluation

basic measures of activity

measures of efficiency

outcomes

programme aims

policy evaluations

organisational evaluation



Research for Course Evaluation

formative evaluation

summative evaluation

cross-sectional studies



