Introductory Remarks

I am very pleased to be with you this afternoon and to share with you my rather limited experience in starting and making open learning systems work. But, first let me begin by paying a tribute to our host, the Open University of the UK, which over the last quarter of a century has acted as a model for many open learning systems established all over the world. In the wake of its success arose some of the biggest universities we have seen. Many, such as the Open University of Thailand are almost identical to the UKOU and others, such as the Open Learning Agency of British Columbia, a little different. Regardless of the model, all of these institutions, and there are about 25 dedicated open universities, seem to share a few things in common. These are:

- they aspire in principle, at least, to balance inequalities between age, gender and social groups in terms of educational access;
- they attempt to offer 'a second chance' to those who may have missed out on earlier opportunities;
- they provide efficient and speedy training for targeted groups;
- expand the capacity for education in new areas;
- they extend education beyond barriers of space and time;
- they develop multiple competencies through recurrent and continuing education; and
- they allow for learning to take place parallel to work and social obligations.

Given the nature of their clients, products and community expectations these major open universities have in some way or another developed very much like each other in their broad make up. If one were to examine the basis for this remarkable similarity, one would discover that:
• they look very much like an industrial organisation geared towards production, delivery and support services but take education to where students are rather than the other way around;
• they attempt to be learner centred in their nature;
• they have a national presence;
• they rely on technology both new and old;
• they have greater use for part-time staff especially in student support areas;
• they provide highly flexible learning arrangements;
• they conduct teaching and learning based on a complex and highly interdependent system; and
• they incur high up-front capital investment and more modest recurrent costs.

During the next forty minutes or so that we have, I will divide my presentation into three parts:

1. I will briefly reiterate some points to those you may have already heard about in terms of key planning and implementation considerations once the decision has been made to start, say, an open university or a distance education system.

2. In the second part, I would like to discuss with you the case study of the Open Learning Institute of Hong Kong; I chose the OLI for three reasons:

   (i) in some ways it is unique in the manner in which it handled curricular issues;

   (ii) its financial arrangements are challenging and perhaps characteristically Hong Kong; and

   (iii) most importantly, I have personal knowledge of the organisation and therefore I can share with you insights into lessons to be learnt from that experience.

3. In the third part, I will present to you a video programme looking at the OLI five years after its launch to see how far the objectives of the community, the planners and the managers have been accomplished.

PART 1

In a recent UNESCO study, Erling Ljosa, the Norwegian distance educator, identified ten (10) major components that are essential in starting an open university system. These are:

1. A Clear Mission for the Organisation

Open universities need very strong political backing. If one looks at all of the successful open universities of the world one would discover that every one of them had the backing of the political forces of the country (e.g. UK, India, Pakistan, British Columbia); academe or the bureaucracy by themselves have not
been forward looking enough to be free from entrenched interests, prejudices and beliefs to accept that learning, especially at the higher level by mature individuals, can take place autonomously. To obtain and sustain that political backing, open universities must have a clear view of their mission and this has to be explicitly communicated to the public at large. Such mission objectives can include any number of statements from cost effectiveness to democratrising education, but it is important that the institution's mission reflect the aspirations of the communities in which it functions.

2. The Profile of Programmes and Course Curriculum

The clients that open universities serve are as unique as the universities and their missions. They are mostly students by choice and their motivation to study is very often different from clients of traditional systems. This does not mean, however, that the desire to be challenged intellectually and be subjected to the same academic rigour and assessment is not there. A large proportion of those participating in open universities also aspire for credits and credentials and many use their learning experiences and achievements for career and social mobility. A major consideration when starting open universities, therefore, has to do with achieving programme and curricular parallel to conventional systems.

3. Teaching Strategies and Techniques

This is largely determined by the course curriculum, economics and the availability of delivery vehicles. Science and technology courses will require laboratories and workshops for students to perform hands-on tasks; in some cases, use of broadcast television may not be advisable because of costs, in others it may; computer-based learning systems have to be carefully evaluated to prevent marginalising those who may not have access to these systems. Learner centred approaches to teaching may be appropriate for low population higher level courses but may not be possible for high population lower level courses.

4. Learning Materials and Resources

It is the most important element in an open learning system. Developing high quality learning materials is time consuming, requires adequate resources, involves the entire academic community of the system as well as the skills and expertise of many in a number of associated areas. Some institutions have centralised the entire course creation, development and production processes, others have dispersed the various components to institutional and/or commercial agents and yet others have gone for the acquisition of ready made learning materials and adapt them for their purpose. Increasingly, the last option may become standard practice as the cost of course development keeps on increasing in parallel to the variety of specialised skills needed for such development. Whichever approach is taken, it is important to recognise that the ultimate ownership of the curricular materials and their quality rests with the institution which is delivering the curriculum to its registered students.

5. Communication Interaction

The student of an open university may be at a distance from the institution but this person need not be isolated. An effective system of communication between the learner and the institution is an important pre-requisite in a distance teaching university. Such a system provides information, counselling, advice on courses and programs, on tuition, examinations, progress and scores of other information that bind a learner to an institution. Today's technology makes this kind of communication a lot easier than say thirty
years ago when all that could be relied on were the postal and telephone systems. I know of at least one institution where students are actively encouraged to use the Internet to communicate and transact business with their university, their course academics, tutors, peers, library, etc. The retention level of students in such a system is high and there is a close identification with their institution.

6. Local Support Systems for Learners

Home-based learners do flourish when there is a good mentor or tutor at hand; learning is enriched when there is a library accessible to them; science and technology courses become meaningful when opportunities to conduct experiments are on hand, and learning becomes enjoyable when the learning experience can be shared with those in a similar situation. I have always found that the commitment of a distance teaching institution to its clients is often reflected by the level of support such a system provides for its clients.

7. Delivery Systems

Courses travel to students in distance education systems. Mechanisms must be established to have the course in the hands or screens of the learner on time and as previously informed or scheduled. The use of the public broadcast media, the electronic highway or the less expensive postal or the expensive courier services has to be pre-arranged long before launching. Some systems require students to come to them to collect the course materials. In a city-state like Hong Kong or Singapore, it is not too much of a burden for most students but there will always be those who may not be able to do so even in these city states; alternatives must be available. The obligation to deliver the course to the learner is the responsibility of the institution.

8. The Tutorial Assistance

Course tutors are the closest to a human face for an open university student. They have to be carefully selected, trained and monitored in terms of their performance. The majority of them are part-timers with other professional and social obligations. This responsibility has to be taken into account when allocating work and demanding performance from them. If inducted properly, trained and supported well, they are a great asset to the institution. Failure to do so causes untold misery to learners and brings disrepute to the institution. The personal/professional development of tutors should be of concern to the institution as well.

9. Staffing Infrastructure

An open university system requires staff with unusual and a wide variety of skills. Some parts of the organisation are typical of any tertiary institution; others such as media producers, broadcasters, print shop managers, warehouse supervisors, experimental kit assemblers, postal system experts are not. There are less full-time academics and more administrative staff in an open university. Provision also has to be made to use a lot of sessional and part-time workers.

The academic part of staffing itself presents a challenge. One is looking at individuals who are not only knowledgeable experts in their respective fields but also good at communicating in a variety of media. There will also be a demand to know beyond one's narrow field of expertise as well as skills to critically
review the 'knowledge' contribution of one's peers to a common knowledge product. Training of academic colleagues for the demands and practices of distance education is an imperative.

10. Management and Administration

Committed leadership, effective management, sensible and efficient administration are vital to the well-being of an open university. Increasingly, the reliance on computer technologies and programmes have become an unavoidable necessity of the systems. Student data, tutor monitoring, material distribution, broadcast scheduling, conduct of examinations, remote enrolment of students are all part of a daily routine. All of these have to be accomplished without forgetting that at the end of a registration number is a person who is managing to study on his or her own. Open university systems have been fortunate in attracting visionary and effective managers in the early pioneering days of the culture. The challenge to many of us today is still to maintain the pioneering spirit while coping with the demands of the next millennium.

Very few of us who are given the responsibility of starting open universities have the luxury of putting all of the components into place before the first students are enrolled. Experience, at least in the developing world, seems to indicate that having made a commitment to launch an open university, political leaders would most likely want the launch to happen before the next elections. This would mean starting with a lot less than the ideal configuration of components, but this does not mean that less than the ideal should be perpetuated. Some of our biggest and best open universities began modestly but have grown stronger and better as they matured through clever planning and sensitive management. This sensitivity seems to hinge on five key elements. They are:

1. Planning - Very careful forward planning to determine learning and training needs of the community, application of distance education techniques towards meeting those needs, availability, usability and cost of delivery vehicles, a sense of the technologies that are applicable in and available to the community, cost and economics of the initiative, and garnering community and political support.

2. Expectations that are tempered with realism; there is always a danger of overextending both the organisation's capacity as well raising the expectations of the users as well as the community. There is also a need to measure the versatility of the media and the capacity of the technologies in terms of their instructional capabilities.

3. Human and Physical Infrastructure - Investment in people to become comfortable distance educators, to work in teams, to share a common vision and bring a commitment to educating the 'people' is seen as a much more important investment than on material infrastructure. This does not mean that a state of art television studio or the fastest computers are not important. They are, but ignoring the former in favour of the latter creates difficulties.

4. System Evaluation - Regular evaluation of the teaching and learning environments, the materials, tuition, overall quality of academic, administrative, and financial management of the system is beneficial. An external audit by independent auditors has often been helpful at both the programme and the institutional levels. Cost benefit analysis, economics of the systems and a measurement of the strengths and weaknesses of the organisation and its management are healthy and necessary to confront critics and enable supporters to fight the cause of open education.
5. *Good Communication with all stakeholders* regularly is critical for the survival of open universities. There is a constant need to develop spokespeople, like those involved in and have a sympathy for distance education, for the university. There is a need to be in touch with present and former students to share with them the plans of the university and the direction it is going. Current students, part-time staff, regional administrators, government officials, financial sponsors, business and industrial leaders all have to be kept informed of programmes, courses and other academic and training initiatives and opportunities available through the university. Such sensitising of the 'market' is good for future 'business'.

**PART 2: The Open Learning Institute of Hong Kong (three years from launch)**

In the year 1989, the Government of Hong Kong decided to launch its Open Learning Institute after an 18-month long planning period. They gave the first Chief Executive Officer less than five (5) months from the date of legislative approval to actual enrolment; further, in very typical Hong Kong fashion, they wanted the new Institute to become self-financing within three (3) years of establishment. In collaboration with the founding director, I did a review of where the Institute was some three (3) years after its launch. The review is presented as an Annex. You may wish to spend a few minutes reading through the review and discuss the following:

1. Is the mission of the Institute clearly defined?
2. At the end of three years, were the Government's planning objectives being met?
3. How accessible is the Institute to its clients?
4. Is the use of media appropriate, sensitive and economical?
5. Are the strategies towards self-funding adequate?
6. Are the student support systems including the tutorial systems clearly established?
7. Is the management and administration of the Institute responsive to the community's expectations and sensitive to student needs?

**PART 3: The Open Learning Institute of Hong Kong (at the end of five years)**

The OLI Hong Kong celebrated its fifth birthday in June 1994, at which time it:

1. had become completely self-financing;
2. had graduated close to 1,700 students;
3. has nearly 21,000 (active) enrolled students;

4. has available over 100 courses leading up to about 30 sub-degree first-degree and post-graduate degree qualifications;

5. has, with support from a grateful community, built its own campus;

6. uses locally developed and imported learning materials for its courses;

7. uses a comprehensive range of media and student support systems including trained tutors who are monitored and assisted at a ratio of one (1) tutor per 30 students; and

8. is considered a highly cost-effective model with a high quality of education.

Concluding Remarks

Increasingly, academic institutions are being forced to respond to the changing nature of the workplace, population structures, diminishing resources, learner expectations and increasing demands of efficiencies by their communities and governments. One of the ways in which these demands is being met is through the use of alternate delivery methods of knowledge products. The experience of the open universities over the past thirty years is most relevant to the directions which our academic institutions are being urged to take, at least in their teaching and learning functions. Many of those who are currently managing open university systems will argue that we are witnessing not only the beginning of a new way of learning but an end to the old way of teaching. Students, whether they belong to the formal age cohort of 18-24 or to a different age group, will probably be entering higher education with much better skills to be autonomous learners than those of an earlier generation. This would mean that a majority of universities will have to reorganise their curriculum, delivery methods, assessment methods, institutional management and administration in order to respond to these new learners.