ó THE COMMONWEALTH   *of* LEARNING

_____

Roles and Competencies in Distance Education

_____

by

Jennifer O'Rourke

May 1993

Preface

This report is designed to be used by planners, policy makers, and other decision makers who are instrumental in setting up and/or managing a distance education system, and who are planning for staffing and training needs. It provides guidelines on the basic tasks involved in managing a distance education program and the staffing required to handle those tasks. This report presumes a basic familiarity with distance education systems. Publications listed in the Introduction to Distance Education section of the <u>Directory of Courses and Materials for Training in Distance Education</u> can provide preliminary information for those without this background.

The guidelines presented in this report are designed to address a broad range of distance education systems while at the same time providing information which is specific enough to be a useful reference. The report is divided into four sections: I. Introduction; II. Competencies in Distance Education; III. Tasks and Roles in Distance Education and IV. A Chart of Tasks, Roles and Competencies.

I.   The Introduction presents some issues regarding the changing context of distance education.

II.   The section on Competencies addresses the broader scope of competencies required for distance education management. It is presented before the section on Tasks and Roles for two reasons. Competencies, especially in the area of leadership and administration, are more general sets of skills and attributes than those required for specific roles in distance education, and individuals with these competencies may hold a variety of positions within an organization or institution and may not necessarily have an association with distance education at the outset, especially if distance education is a new program. It is important to identify competencies in the context of education and management generally, without limiting them to the specific tasks involved in distance education. Also, most roles in distance education require a combination of competencies from a number of different domains.

III.   The section on Tasks and Roles outlines the main sets of tasks required in distance education and the roles of those who implement these tasks. It is anticipated that information in this section could provide the basis for developing job descriptions for recruiting personnel.

IV.   Finally, the Charts on Tasks, Roles and Competencies synthesize these components, by providing a framework for matching the tasks, roles and competencies required for a given distance education context, depending on its size and stage of development.

Commentaries on issues relate to organizational structure and procedures are included where they related to specific areas.

There is some variability in terminology used to describe various roles. This reflects the variations commonly used in distance education practice, where academics or teachers engaged in course development may be called content experts, subject matter specialists, course authors or subject matter experts: those whose expertise is in instructional techniques may be termed instructional designers, instructional developers, course editors or course developers, and those who have regular instructional contact with distance students may be termed tutors, tutor-markers, tutor-counsellors, instructors, student support. Those who manage local centres may be termed study centre coordinators, site coordinators or regional coordinators. While the report endeavours to maintain consistency in usage, some similar terms may be used interchangeably.

This report is designed to be used in practice and it is hoped that users will provide feedback based on their own experiences in distance education, which can in turn be used to update and enhance this work. Comments should be addressed to Director, Asian Programmes and Training, The Commonwealth of Learning, #1700-777 Dunsmuir Street, Box #10428, Vancouver, British Columbia, Canada V7Y 1K4.

ROLES AND COMPETENCIES IN DISTANCE EDUCATION

I.   INTRODUCTION

One of the challenges of describing roles and competencies in distance education is that the field itself is changing rapidly, as it expands into new areas, both geographical and educational, and as established distance programs reassess their goals and consequently their systems and structures. As Jocelyn Calvert has noted, "Distance education is not a fixed strategy, but rather a symbol for diversity, flexibility and access. What we call distance education must be capable of taking many forms." (Distance Education in Single and Dual Mode Institutions, The Commonwealth of Learning, 1992).

To avoid the difficulties inherent in predicting the future or in imposing models from another time and place on to different contexts, this report should be seen as a work in progress, a draft framework to provide preliminary guidelines, which can be changed or adjusted in response to feedback from users in a variety of situations.

The following factors may change the roles and competencies required for successful launching and operation of distance education programs:

1. Social context and clientele. Much of the recently documented experience in distance education practice is from tertiary institutions operating in first world countries. As distance education practice expands in third world countries, and as it serves learners across the educational spectrum, from primary education to the workplace, its structures and systems may change in response to the needs of the clientele. For example, systems and roles derived from a university context in which academic and administrative roles are traditionally defined may not be appropriate for a situation in which learning materials are developed for technical training in the workplace and a shop foreman is the mentor.

2. Second generation distance learning. Many of the roles and structures that have evolved to date were designed to address the fact that providers of distance learning are often new to the field, and need to re-orient their own perspectives and practices in education and help others to reconsider these issues when developing distance education programs. After twenty years of distance education practice, and in contexts in which educators themselves have studied at a distance, this requirement for re-orientation may be reduced, and there should be more provision within roles and structures for educators to integrate their own experiences both as distance learners and as distance educators.

3. Financial considerations. In almost all contexts, there are increasing demands that funds invested in distance education programs are well spent; that duplication of effort is avoided, resources are shared as much as possible, and there is a coherent rationale for each new program. In turn, this requires increasing collaboration among providers. Those in distance education may need more skills in working with others who are not part of one's organizational culture or structure, and who may be from different sectors, while still meeting the primary goal of serving the learners' needs. Research and analysis skills will also become increasingly important, in order to demonstrate that proposed distance programs are meeting an unmet social need, or serve an identified need more effectively than other alternatives do.

4. Institutional context. As distance education becomes more commonplace, and is seen as part of the teaching repertoire or administrative repertoire of an organization rather than a separate enterprise, there may be increasing pressure to subsume distance education into the organization as a whole. While integration has many possible benefits, it can also put more demands on those who are in the position of serving as advocates for the unseen student, as tutors, counsellors or administrators.

There is also a trend towards regarding distance education as a profit making enterprise, which may require reaching out to new clientele, providing more short courses or non-credit programs to very specific groups of learners. Balancing the needs of the clientele with a profit making mandate will require a shift in perspectives, roles and skills of distance educators.

Although the debate may continue about whether a single or dual mode distance institution serves students better, a more significant factor than the type of structure is the extent to which services to distance learners are centralized or decentralized. A centralized system is one that provides all course materials, registration, tutorial service, counselling and student support from one central location, using distance means, such as mail, telephone and computer contact, to serve its learners. A decentralized system may have a centralized course development and course duplication system, but provide some or all of the following services through regional or local centres: registrations, student record keeping, assignment marking, tutorial services, student counselling. It is possible that decentralization can go one step further, sharing course development among course team members at several regional sites, or translating and duplicating course materials into a regional language at a regional centre - these concepts are proposed for University of the West Indies and Indira Gandhi National Open University, respectively. If the trend toward decentralization continues, it will further challenge the industrial model of mass production from a central location staffed with specialists (which has been used to describe centralized distance education), and replace it with a more community-based extension model which relies more on generalists with a range of skills, especially the ability to communicate with other members of the organization at a distance.

5. Societal changes. Increasing acceptance of lifelong learning for both personal and professional growth will mean that both prospective learners and providers will consider distance education as a viable option to meet learning needs at various stages of life and careers. The value of distance education for improving qualifications of professionals in practice, such as teachers and nurses, has been demonstrated over 25 years of practice. Open and distance learning are being used in a wide range of settings: workplace learning, technology training, volunteer training, enhancing the range of subjects available in remote primary and secondary schools, etc. Distance education expertise could evolve into several layers, with experienced providers developing materials which are then offered at a distance by a number of smaller organizations, and also offering training in distance education practice to smaller, regional, or more specialized providers.

6. National programs. As distance education develops in support of a national system of education, especially at the tertiary level and in technical/vocational areas, there may be more need for roles in coordination and direction from a national or regional perspective. (This is already happening in India, for example, where IGNOU has a role in coordinating distance education provision across the country).

7. Changing technologies. While print will remain as an important medium in distance education, the increasing use of other media may change approaches to distance education. As video and audio techniques and equipment become simpler and more affordable, it is very likely there will be a trend away from the production style more typical of broadcast standards, which requires substantial script preparation, studio work, and editing, towards a less formal, less produced standard, which requires a different working approach. Rather than a media expert reconfiguring raw material prepared by a subject matter expert, the subject matter experts will be required to become more familiar with the use of the medium, and the media expert will become a resource person and mentor, enabling others to become competent users of the medium. The increasing use of slow-scan video and similar technologies for real-time interaction can reinforce this trend, since the emphasis is on the quality of the interaction rather than on any given image or component. In the print medium, with the advent of desktop publishing, there are two divergent possibilities: one

is that print preparation could become a more exclusive domain, in which content is transformed by media experts; and the other is that as subject matter experts have increasing access to and facility with computers, they will be able to work along with those with graphic design and computer expertise, to develop a familiarity with the medium and its capabilities.

II.   COMPETENCIES IN DISTANCE EDUCATION

Perhaps this report should be re-entitled competencies and roles in distance education, because competencies which are essential for successful distance education can be held by people in a number of different roles in different situations. In other words, this report will begin by identifying the kinds of competencies needed for the start-up, implementation and ongoing operation of distance education, and then identify the roles where those competencies are most effectively held. Rather than determining *a priori* which roles are needed and attempting to apply them as a model template to an organization, this report provides guidelines for the essential competencies and suggests the roles in which these competencies can be expected and in which they would be most effective. Roles differ within organizations, depending on the context, objectives, size and stage in that organization. Some models of types of roles and relationships typical of distance education systems at different phases and sizes are presented in the following section on tasks and roles.

What is more important than defining roles in advance, for a young organization, is to provide for growth, to build in provision for increased competency, through mentorship and other opportunities for learning both on the job and away from the workplace. Part of this provision entails establishing roles in such a way that more senior people have as assistants or co-workers "understudies" who can then take on more responsibilities as they learn more and as the organization grows. This approach, of building a learning organization, also provides a career path and motivation at every level within the organization.

Commentary: Organizational Structure

While the issue of organizational structure is somewhat beyond the scope of this report, if an organization is to foster continued learning and growth, its structure is an important factor. Much has been written recently about the "flat" organization, in which decision-making is shared among a fairly wide group of competent people, in contrast to the hierarchical structure in which a chain of command strictly allocates levels of decision making according to rank. It can be argued that since distance education has as one of its goals the democratization of education, its methods and structures should also permit shared decision making. There are functional as well as philosophical reasons for this recommendation: in a situation where there are limited resources, a flatter organization means that staff who are directly involved with the practical tasks, such as course preparation or contact with learners, are enabled to use their experience and feedback to contribute to shared decision making, and in turn can become competent and knowledgeable about many other aspects of the distance education program.

The competencies listed below are not presented in rank order of importance. All are considered essential. However, it is reasonable to expect that these competencies, especially those in the leadership category, would not necessarily be the attributes of one individual: ideally, a team of people share leadership competencies and complement each others' attributes.

COMPETENCIES

1. Leadership

Any retrospective reflections on the real or mythologized history of a successful distance education enterprise highlight the importance of key persons who had the vision, influence and leadership skills to get the project off the ground and nurture it through its early years. The attributes of leaders in distance education projects tend to be:

• vision of the rationale, scope and potential impact of a distance education program in their own context;

• clear view of prospective participants and their needs;

• access to financial and human resources and/or access to decision makers who have access to these resources;

• senior decision making authority and respect within the organization;

• credibility among teaching staff;

• an understanding of how distance education works and an overview of the planning, resource allocation and promotional tasks required to launch it;

• an understanding of how their own organization works and of how distance education will affect existing systems;

• an understanding of the relationship between the proposed distance education project and other educational providers within the region;

• ability to communicate and coordinate distance education endeavours with other educational providers in the region, to ensure accreditation is recognized, minimize duplication of provision, etc.

These attributes could be those of a single individual or of a number of individuals in key positions within an organization. If a single individual is the sole leader initially, other important attributes are required:

• ability to convey to others in the organization the value of distance education and earn their support for the project;

• ability to identify training needs and provide learning opportunities about distance education processes to teaching staff and administrators responsible for implementing the project, either directly by mentorship or teaching, or indirectly, by seeking out and establishing appropriate learning opportunities, such as secondment, short term attachments to distance education projects, formal training, etc.

ROLES: The leadership competencies could be in one or in several key individuals within an organization. Positions within an organization which lend themselves to effective use of these competencies to launch a distance education project are:

• senior administrator, such as a principal or vice principal, pro vice chancellor, dean of continuing education;

- senior member of teaching staff, such as a professor or senior lecturer, department chair;

- senior ministry of education staff member who can be seconded to full time work on the project;

- senior staff member in a private or non profit organization, e.g. director of human resources, training, etc.

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

- principal of distance education institution or program;

- academic director of distance education program;

- director of continuing education;

- senior administrator of distance education.

2. Administrative Skills

Administrative skills are equally important as leadership skills in launching and maintaining a distance education program. Ideally, persons who share the vision of distance education of the individual(s) in the leadership roles provide the kind of administrative competencies needed to begin the project. Administrative competencies include:

- vision of the rationale, scope and potential impact of a distance education program in their own context;

- a clear view of the participants and their needs;

- logistical skills: the ability to foresee and plan for logistical requirements; scheduling and materials production knowledge; creative problem solving abilities, knowledge of the organization's infrastructure and of the communications and transportation infrastructure of the region where participants live;

- financial management skills: 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 student support systems;

- an understanding of how distance education works and an overview of the planning, resource allocation and promotional tasks required to launch it;

- an understanding of how their own organization works and of how distance education will affect existing systems;

- ability to determine the systems needed to support distance education within a given context, to set up new systems and to evaluate their effectiveness and modify them if necessary;

- respect and credibility within the organization;

- ability to identify training needs and to provide learning opportunities for others within the organization, either directly as a mentor or trainer, or indirectly, by seeking out and making provision for appropriate learning opportunities, including secondments, job sharing, formal training, etc.

ROLES: 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 program is launched, these individuals may be in these positions:

- administrator within an academic unit, such as a vice president, administration; program director; dean;

- manager of an administrative unit, such as student services, registrar;

- administrator of continuing education.

As a distance education program is launched, these individuals may occupy the following roles or positions:

- administrator of a distance education unit;

- administrator of continuing education;

- director of outreach services.

3. Teaching/Course Development

In distance education, teaching responsibilities are usually divided into two phases, that of course development, in which course materials are prepared in advance, and tutoring, in which instructional support is provided to learners as they are using the materials. Course development tends to be subdivided further into two aspects, that of providing subject matter expertise, and that of providing expertise in the area of instructional techniques appropriate to distance education. 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 distance education proposed by the program leaders. The following competencies are important:

COMPETENCIES/ATTRIBUTES

- at ease with adult learners; aware of particular needs and circumstances of adult learners; (even if the distance project is serving young school-age learners, experience with adult learners provides skills in dealing with more open ended learning situations, handling logistical arrangements, etc.);

- ability to plan, schedule and implement labour intensive tasks, as could be demonstrated by curriculum planning committee work, responsibility for development of special projects; active participation in an examinations board;

- knowledge about how distance education works, and about the kinds of resources and timeframes needed for course development;

- ability to work as a member of a team.

Course Developer/Subject Matter Specialist

- openness to new ideas, new perspectives on one's discipline;

- expertise in a subject area or discipline, and in teaching that subject area or discipline;

- willingness to learn new approaches to teaching and learning.

Course Developer/Instructional Designer

This individual may be a media specialist or teaching staff member with 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 the course team leader, with additional competencies in the following:

- 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; competence in writing and editing are basic; competence in preparation of audio materials is very valuable; skills in preparation of video materials are also very helpful;

- ability to communicate knowledge and skills to others while working with them as peers on course development tasks;

- knowledge of the logistical requirements of the media in most common use: for print materials, knowledge of print preparation, scheduling and production processes, of copyright requirements. For audio materials, knowledge of preparation and production processes and copyright. For broadcast media, knowledge of standard broadcast requirements and regulations, range of transmission capabilities, copyright.

ROLES: Prior to start up of distance education, 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;

- media specialist with teaching experience in another discipline.

After distance education program is launched, this individual could be designated as follows:

- course author, either solo or as member of course team;

- course developer/instructional developer/instructional designer.

- Course team leader*

* course team leaders need additional competencies:

- willingness to share knowledge and competence in distance education course development with peers;

- acknowledged competence and credibility among colleagues;

- ability to work with others and provide leadership in labour-intensive, deadline-oriented tasks;

- ability to communicate and negotiate plan of action and task assignment

4. Teaching, Tutoring, Student Support

Those in direct contact with learners, in teaching, tutoring and student support roles, require the following competencies and attributes:

- at ease with adult learners; aware of particular needs and circumstances of adult learners; (even if the distance project is serving young school-age learners, experience with adult learners provides skills in dealing with more open ended learning situations, handling logistical arrangements, etc.);

- expertise in a subject area or discipline, and in teaching that subject area or discipline;

- knowledge about how distance education works, and about the kinds of resources and timeframes needed for distance education course delivery;

- ability to work as a member of a team;

- knowledge of administrative systems within one's own organization;

- 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;

- interpersonal skills in student advising, counselling, problem solving.

ROLES: As distance education program is being launched, this individual may be in a role such as:

- director of student services;

- student counsellor;

or may be in an academic position which requires extensive contact with learners,
- lecturer, tutor, etc.

After a distance education program is launched and roles are formalized, this role may become:

- tutor;

- tutor/counsellor;

- Tutorial services/student counselling coordinator*

* tutorial services/student counselling coordinator, requires additional competencies:

- ability to oversee effectively the teaching/advising work of others;

- ability to provide learning opportunities for others working as tutors, either directly by mentorship, provision of workshops and seminars, or indirectly, by seeking out and providing for formal or non formal learning opportunities.

5. Logistics Coordination

These competencies are essential to the smooth operation of a distance education program. While the roles assigned to these important tasks tend to be considered "support" or "clerical", a distance education system cannot operate if the right materials are not sent out at the right time, if assignments are not handled correctly, if provisions are not made for secure operation of examinations.

COMPETENCIES

- ability to foresee and plan for logistical needs of distance education, 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 organize 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 distance education;

- ability to coordinate with other organizations and institutions, at a distance, for set-up of study centres, examination centres, etc.;

- 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, etc.;

- knowledge of stock control systems and of production lead times required to ensure stock levels are maintained.

ROLES: Prior to the start up of a distance education program, individuals with these competencies may be in a variety of roles:

- administrator;

- administrative assistant in larger unit;

- office manager;

- senior secretary;

- assistant registrar;

- unit manager.

After the start up of a distance education program, the most important logistical roles may be defined as follows:

- student services administrator;

- information/promotion coordinator;

- enrollment coordinator;

- assignments and examinations coordinator;

- materials warehousing and dispatch coordinator.

6. Research and Evaluation

This is an important competency at every stage of a distance education program. Ideally, persons in leadership roles are sufficiently committed to monitoring and evaluating the program, and sufficiently familiar with basic monitoring and evaluative processes that they can build these into the program. While not all staff could be expected to have all the following competencies, these are the ones most valuable in a distance education program:

- an understanding of the basic goals and procedures of research in education;

- ability to identify which aspects of a distance education program 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 distance education unit should provide, in consultation with community members, prospective users, and relevant members of the organization;

- ability to design monitoring procedures which can be incorporated easily into normal administrative processes;

- ability to identify prospective research studies, in consultation with relevant members of the organization, and in light of current research, unique aspects of the program, needs of the program;

- 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 distance education program 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;

- ability to synthesize information and data and prepare a report which identifies significant outcomes.

III.   TASKS AND ROLES IN DISTANCE EDUCATION

As has been mentioned above, tasks and roles may vary, depending on organizational or institutional context, on the stage of development of distance education, and on the goals of the distance education program. What follows below are the most common clusters of tasks and roles in distance education, grouped around the central functions in most distance education systems: policy making, planning and management, research and evaluation, course materials development, administrative systems support, student support and library service. Tasks and roles for the first three items in the list, policy making, planning and management and research and evaluation are described in more general terms, reflecting the broader scope and wide range of possible configurations of these situations. For most sets of tasks and roles, there is a distinction between those required in the start up phrase and those required in the implementation phase, and if there are different requirements for a centralized or a decentralized system, these are noted as well.

POLICY MAKING:

START UP PHASE

Those in leadership positions are responsible, probably in consultation with those in leadership positions in the organization as a whole, for establishing policies regarding major issues such as:

- scope and nature of the program;

- population to be served, in terms of their learning needs, prior qualifications, age range, locale;

- relationship of the proposed distance program to those offered by other providers, within the institution, and/or beyond the institution (either face to face or distance);

- accreditation of the proposed program;

- budget allocation for start up and implementation phases;

- ongoing financing arrangements for the program; proportions of financing to be obtained from grants, student fees, special funding.

Those in leadership positions are also responsible, in cooperation with others in leadership roles in the organization, for:

- articulating and promoting the concept of distance education, and for communicating the scope and intent of the program, describing its role within the organization's mandate and its benefits for society, for the users, and for the organization, in order to gain widespread support for the program;

- reaching agreement with other interested parties, such as educational providers, accrediting bodies, etc., about the relationship of the distance program to other programs, external acceptance of credit transfer and accreditation, etc.

IMPLEMENTATION PHASE

Those in leadership positions are responsible, in consultation with those in leadership positions in the organization as a whole, and with those actively engaged in the distance program as staff or learners, for reviewing policies and determining if changes are needed for greater effectiveness and efficiency, or to serve new clientele, or to adapt to changing conditions within or beyond the organization.

They continue to be responsible for promotion and development of support for the program, within the organization, among prospective users, among employers, and in society as a whole.

They continue to be responsible for intra- and inter-organizational consultation on major issues such as accreditation, articulation of distance education programs and other educational opportunities, policy, etc.

PLANNING AND MANAGEMENT:

START UP PHASE

Those in <u>leadership and administrative</u> positions are responsible for:

- preparing schedules and budgets for development and implementation of the program;

- identifying and recruiting staff for providing administrative support, such as student registration, clerical support for course development, duplication and delivery, for handling assignment submissions, returns and record keeping, for setting up arrangements for examinations, secure duplication and delivery of examination materials, receipt and recording of students' exam papers; OR for arrangement with other units within the organization to handle some or all of these tasks as part of their responsibilities;

- recruiting subject matter experts for course development, and/or identification and modification of appropriate course materials, (either on a full time or part time basis) OR identifying and obtaining agreements for secondments of appropriate individuals to take on these roles;[1]

- identifying and recruiting a course development administrator and other staff to work with subject matter experts or course development teams, as instructional designers, media specialists, production specialists (either on a full or part time basis) OR identifying and obtaining agreements for secondments of appropriate individuals to take on these roles;[1]

- establishing, in consultation with course development administrator, systems and procedures for course development, course duplication and dispatch;[1]

- establishing systems and procedures for student enrollment, for record keeping, for assignments and examinations transmittal, in consultation with registrar or administrator of student records of main organization, and distance education student services administrator; [2]

- establishing a promotional and information program to announce the distance education program to prospective users, to gain support for it within the organization.

[1] These responsibilities are listed under those of the senior administrator and of the course development administrator. While this may appear to be duplication of effort, it is suggested the senior administrator take on these responsibilities in the very early stages of the project, then recruit a course development manager, with whom these responsibilities are initially shared, and then to whom they are ultimately handed over completely.

In centralized system, also responsible for:

- setting up systems to provide student support at a distance, including tutorial, counselling, library service, using means appropriate to the context and feasible given communications and transportation systems available.[2]

In decentralized systems, also responsible for:

- setting up a system of local and regional sites for tutorials, administration and record keeping, promotion of programs, student counselling, library service, and for communication and administrative linkages between the central distance education unit and the local and regional sites;[2]

- in consultation with the tutorial services administrator and with local and regional site coordinators (and with the relevant academic department, if required), identifying and recruiting tutors for local and regional sites.[3]

[2] These responsibilities would be shared with the student services administrator, if this position is part of the staff at this time.

[3] These responsibilities would be initially shared with the tutorial services administrator, then taken on by tutorial services completely.

IMPLEMENTATION PHASE

After implementation, those in leadership and administrative positions are responsible for:

- monitoring the major activities of the unit or project, such as course development, production and dispatch, administration of student services and record keeping, evaluation;

- identification of any problem areas that need review, determining if issue is in resource allocation, role structure, staffing, level of accountability, and taking action to remedy the problem;

- actively sustaining communication and administrative links between central distance education unit and regional and local sites to ensure that systems to serve students through these sites are operating efficiently, to obtain feedback about any issues that are apparent to local or regional site coordinators.

RESEARCH AND EVALUATION:

Before the start up phase, staff are engaged in research to identify the need for the program, and in preparing advice for policy makers on feasibility, projected scope and scale, populations to be served, etc.

During the start up phase, staff who have research skills would be responsible for:

- developing appropriate systems to
  - record student characteristics, retention rates, points of drop-out, success rates, student evaluation of course materials and processes;
  - monitor costs of course development and delivery;
  - monitor efficiency of course materials dispatch, receipt and return of assignments;
  - monitor tutor feedback (in conjunction with director of student services, if there is one).

During the implementation phase, staff who have research skills would be responsible for:

- monitoring the outcomes from the systems developed above; weighing and cross referencing information received, and recommending adjustments to the monitoring and evaluation systems based on this feedback;

- recommending changes to course development processes or to instructional practice (tutoring, assignment marking, etc.) based on considered appraisal of information received from evaluation and monitoring processes, consultation with course authors and course tutors, student services, and administrative staff;

- conducting needs analysis among current and prospective learners to identify learning needs that could be addressed by additional programs, courses, or subject areas.

Research may be conducted by staff within the distance education unit, as part of their job function, and/or by staff external to the distance education unit, depending on the scope and scale of the research endeavour and the requirements for expertise, familiarity with the program and objectivity, for any given project. Staff in the following positions within the distance education unit could be engaged in research projects: course development administrator, student services administrator, course team leader, course team member.

COURSE MATERIALS DEVELOPMENT:

Commentary: Course Teams and the Course Preparation Process

The collected experience and literature about distance education has a great deal to say about course teams: whether courses should be developed by teams, and under what circumstances a course team is more effective than the alternatives. First, it would be useful to define what is meant by course teams. The term "course team" usually refers to a working team assembled specifically to prepare a distance education course, comprising more than one subject matter expert, experts in the media to be used in the course, and someone with the responsibility of overseeing coordination, scheduling and production. This is the model that was established by the Open University in the United Kingdom, and it is predicated on several assumptions: that the course, over its lifetime of eight to ten years, will attract a sufficiently large number of enrollments to justify the expense of the course team and that a course team, through its process of shared expertise and cooperative preparation, will produce a better course than a single author would.

However, the use of the term "course team" to describe the Open University process of shared authorship and course development has tended to eclipse the teamwork in other course development situations. Because preparation and delivery of any distance education course in any context requires a level of cooperation and teamwork that is not typical of face to face teaching, organizations tend to set up a variety of systems to support this cooperation, which are appropriate to their resources, organizational structure and staffing. At the very least, because a solitary course author is unlikely to have access to the production, duplication and delivery facilities needed to prepare and send even a simple print-based correspondence course to students, or to enrol and accredit students, there must be a level of cooperation and planning between the course author(s) and the course provider(s) to handle the logistical arrangements. Further, the role of distance education as a "second chance" for many learners and the fact that distance education materials are more readily subject to scrutiny than face to face instruction has emphasized the importance of ensuring that materials are of the best possible quality for effective learning. This awareness has enhanced the role of those whose expertise is in the preparation of effective instructional materials, and whose role may be course developers, instructional designers, course editors or media specialists.

A number of dual mode institutions in the tertiary sector have in effect, two member course teams, one of whom is the subject matter expert and one who is the instructional materials expert. In these situations, the instructional materials expert often has administrative responsibilities related to the logistics of course preparation, and may be responsible for the course development budget, scheduling media production, handling copyright, and ensuring the course is completed to deadline. One may argue the appropriateness of adding these responsibilities to this role, since it can put the instructional expert in the difficult position of being both the collegial advisor on instructional development and the enforcer of budget and time constraints. However, the fact remains that in organizations with limited resources this is the reality of the situation, which makes it essential to provide sufficient structure and support for all those engaged in the course development process so that the system, rather than the individual, is seen as setting the framework and constraints. Given this support, the two member course team approach has a lot to recommend it, for simplicity, cost effectiveness, efficiency, and potential for developing expertise in both parties, as each learns from mutual mentorship.

Commentary: Administration Aspects of Course Preparation

No matter what the size or arrangement of responsibilities of the course development group, there is a further set of linkages required with the administrative staff responsible for logistics of course delivery and student support; with those responsible for acquisition of texts, lab equipment, or other supporting material; with those responsible for setting up tutorial arrangements and recruiting tutors; with the library regarding the level of library service required by the course; with those responsible for organizing final examination or accreditation arrangements. What results is a network of administrative links and checkpoints which requires a significant level of management and coordination. It is strongly recommended that an organization setting up a distance education program designate one position to take on this role identified here as the course development administrator; it may be a senior staff person with instructional development expertise, or an experienced course author with good administrative expertise, for example, successfully chairing curriculum committees. The role of this person will change over time, and will need to be reassessed as the program grows, but will provide initial continuity and an organizational memory which is essential, especially when many course authors and possibly instructional developers and tutors may be working on a short-term, project basis.

Course development administrator:

START UP PHASE

The individual in the position of course development manager/administrator is responsible for:

- establishing, in consultation with the senior administrator, systems and procedures for course development, including model schedules and budgets, recommended methods for needs analysis, course development, media selection and course evaluation, provisions for working with media specialists, whether these are external or internal members of the distance education unit;

- establishing linkages with other units within the institution whose participation is needed in the course development process, such as the library, audio visual department, graphics department;

- in consultation with senior administrator and/or academic department, recruiting subject matter experts for course development, and/or identification and modification of appropriate course materials, (either on a full time or part time basis) OR identifying and obtaining agreements for secondments of appropriate individuals to take on these roles;[1]

- identifying and recruiting staff to work with subject matter experts or course development teams, as instructional designers, media specialists, production specialists (either on a full or part time basis) OR identifying and obtaining agreements for secondments of appropriate individuals to take on these roles;[1]

- serving as a mentor to the first course development teams, providing consultation and workshops as needed; monitoring to identify any areas in which team members require additional help or expertise, and making arrangements to provide it;

- developing procedures manuals and workshop materials to support course development teams;

- establishing, in consultation with others with research capabilities, evaluation procedures to monitor the delivery phase and the final outcomes of the courses on offer.

1 These responsibilities are listed under those of the senior administrator and of the course development administrator. While this may appear to be duplication of effort, it is suggested the senior administrator takes on these responsibilities in the very early stages of the project, then recruit a course development manager, with whom these responsibilities are initially shared, and then to whom they are ultimately handed over completely.

IMPLEMENTATION PHASE

Note: in the case of course development, it is somewhat difficult to distinguish between the start-up and the implementation phase. While the program is not visibly "in operation" until the first courses are ready and the first students are enrolled, nonetheless course development activity does represent the beginning of the use of staff time, expenditure of budget, etc. For the sake of this profile, the implementation phase is taken to mean the point at which the first courses have been prepared and are being offered to students.

After implementation, the course development administrator is responsible for:

• monitoring the instructional phase of the first courses, obtaining feedback from tutors, learners, local centre administrators about any difficulties that require immediate attention, and ensuring these are addressed;

• identifying any changes required to the course development process as indicated by any aspect of the course delivery process (for example, feedback from tutors or students may indicate that assignments are unmanageably lengthy and students cannot both complete them and proceed with the next required unit: this may indicate a need to test the assignments for length and complexity before including them);

• planning a longer range course development schedule, taking into account the experience of the first course development teams, the potential of increasing expertise in subsequent teams;

• preparing, in consultation with course developers, an initial budget and course development schedule for each course development project proposed;

• maintaining linkages with other units within the organization whose participation is needed in the course development process;

• recruiting subject matter experts for course development, and/or identification and modification of appropriate course materials, (either on a full time or part time basis) OR identifying and obtaining agreements for secondments of appropriate individuals to take on these roles;

• identifying and recruiting staff to work with subject matter experts or course development teams, as instructional designers, media specialists, production specialists (either on a full or part time basis) OR identifying and obtaining agreements for secondments of appropriate individuals to take on these roles;

• ongoing monitoring of each stage of all course preparation projects to ensure they are on budget and on schedule;

• implementing evaluation procedures throughout the delivery phase, reviewing the final outcomes of the courses on offer, and recommending changes to the course materials and or the course delivery in response to the evaluation indicators;

- actively developing and maintaining communications linkages with local and or regional site coordinators in order to obtain regular feedback about how the course materials are used, learners' perceptions, etc.

Commentary: Part-time or Full-time Course Development Team Members

There are a variety of possible arrangements for obtaining the services of members of course development teams. These arrangements include a full time or part time contract with the distance education unit or with the organization as a whole or secondment from another part of the organization or from another organization.

The choice depends on the following:

- the needs of the organization: for continuity, for developing a roster of experienced course development team members, for obtaining access to particular expertise, for supporting other units in the organization (for example, by providing supplementary part time work to an instructor whose academic department cannot afford to hire on full time);

- the needs of the prospective course developers: for secure employment, for flexible working arrangements (for example, to allow for family responsibilities or study demands), for clearly delineated set of responsibilities and timelines (for example, for a senior academic with limited time available), for an opportunity to build up an area of expertise in distance course development; and

- the resources and constraints that govern the relationship between the organization and the course developers, such as union or other employment contracts, taxation provisions.

In general, in dual mode distance education institutions, there are two or three possible arrangements: subject matter experts are recruited from their home department to prepare a distance education course, and the assignment represents a part time secondment or contract, which the author combines with other teaching or research responsibilities as part of full time employment duties; or subject matter experts who are not full time instructors are hired on a short term contract specifically to prepare the distance education course; or an individual from another organization is seconded to prepare a course, on the approval of the relevant academic department. The rationale for these arrangements is usually that the distance education program is congruent with the program offered face to face, and to ensure this continuity, instructors who teach the course in the face to face mode are the best choice to prepare the distance education course materials. Individuals who teach on a part time basis are often considered sufficiently in tune with the department's methods and approaches to the discipline to be entrusted with distance course development.

In single mode institutions it is more common for some subject matter experts to be full time members of the organization, and to take on responsibility for leading course development projects, which may entail recruiting other course team members from outside the organization, especially in situations in which the course is in a highly specialized area.

Increasingly, as two or more organizations collaborate in the development of courses, subject matter experts are contracted from any or all of the participating organizations, depending on their particular expertise.

Subject matter expert:

The subject matter expert is an individual with expertise in a particular content or subject area. Course development begins in the start up phase, and continues in the implementation phase, after the distance education program has been officially launched as new courses continue to be developed. There are core course development responsibilities and additional responsibilities particular to the start up and implementation phases.

START UP PHASE

The subject matter expert who is working on the first course in a particular subject area would be responsible for:

• identifying the particular challenges and constraints in providing a distance education course in that subject area, (for example, making provision for field work in an environmental studies course, or providing for a practicum in a health care course);

• in a dual mode institution, developing ways of demonstrating that the distance course provides the same learning outcomes as the face to face course, even if the methods and some of the content are different.

CORE COURSE DEVELOPMENT RESPONSIBILITIES

• identifying the appropriate entry level competencies required for learners at the beginning of the course, and the outcomes on completion;

• developing, in consultation with other course development members, an outline of the course, including the main content areas, instructional techniques, resource materials required, media choices, assessment approaches;

• preparing course materials; writing course content, reviewing it with other course development team members; revising; preparing materials in non-print media, in consultation with experts in those media;

• working on each stage of revision and course development, including the final stage before duplication, to ensure that the content, structure, assessment and intended outcomes are internally consistent and congruent with the intent of the course;

• if the course is to be piloted, working closely with those administering the pilot arrangements, to ensure the arrangements are consistent with the intended outcomes, planning formative evaluation processes, reviewing results of pilot testing and formative evaluation and revising the course as appropriate.

IMPLEMENTATION PHASE
(Note: "implementation phase" refers to the implementation of the distance education program as a whole, and while this entails delivery of courses, it also includes the ongoing development of other courses.)

Additional responsibilities:
• monitoring the first offering of the distance course, if possible, serving as an instructor or tutor for at least the first offering, providing immediate solutions if problems with the course materials jeopardize the possibility of successful completion, and noting any less serious course materials issues for later consideration;

- making minor revisions to the course in response to consistent difficulties learners may have, or to changed content aspects (for example, new geographical boundaries, new scientific information);

- preparing additional resource materials and/or assignment and examination materials;

- working with course tutors on any issues they present about content, assessment, etc. to help clarify what is intended by course materials, etc.;

- in a context in which the subject matter expert is also responsible for instructing the course, directly, and/or supervising tutors, this role includes supervising and monitoring the work of tutors to ensure consistency and fairness of assessment.

Instructional designer/course developer/course editor:

Commentary: Part Time or Full Time Instructional Designers?

This role complements that of the subject matter expert, and entails contributing expertise on effective instructional techniques for distance education. The person in this role may be hired on a short term contract basis, but is more usually hired as a permanent member of the distance education unit. Especially at the outset, having one or more experts in instructional materials development on staff provides for continuity across course development projects and over time, facilitates the establishment of methods and approaches suitable to that particular organizational context, and fosters the development of working relationships both within the organization, (with, for example a media unit or with academic departments), and with other organizations, which is particularly important where collaboration is required.

There are core course development responsibilities and additional responsibilities particular to the start up and implementation phases.

START UP PHASE

- assisting in the evaluation of procedures and frameworks established for course development, including scheduling, budget, course preparation processes, etc., by monitoring how well the procedures work in practice, recommending immediate changes if a procedural problem poses a major roadblock to successful completion of course development, and noting other issues for review and revision for future course developments.

- assisting in the identification of learning and resource needs among members of the course development team, recommending to the course development administrator suitable approaches to addressing these needs, e.g. workshops in distance education, use of media; preparation of a list of useful books on course development, etc.

CORE COURSE DEVELOPMENT RESPONSIBILITIES

- working with the subject matter specialist to identify appropriate entry level competencies required for learners at the beginning of the course, and the outcomes on completion;

- working with the subject matter specialist to develop an outline of the course, including the main content areas, instructional techniques, resource materials required, media choices, assessment approaches;

- reviewing course materials as they are prepared, providing comments and suggestions about level of language, presentation style, structure, size of units, use of graphics (illustrations, diagrams, etc.), use of media, linkages between components in different media, congruence of content, assessment approaches and expected outcomes;

- working with subject matter specialist and media specialist to prepare non-print media components, including such tasks as script preparation, planning visuals, ensuring continuity between media component and learning objectives;

- working with the subject matter specialist on each stage of revision and course development, including the final stage before duplication, to ensure that the content, structure, assessment and intended outcomes are internally consistent and congruent with the intent of the course;

- if the course is to be piloted, working closely with the subject matter specialist and those administering the pilot arrangements, to ensure the piloting arrangements are consistent with the intended outcomes, planning formative evaluation processes, reviewing results of pilot testing and formative evaluation and recommending revisions to the course as appropriate;

- working with subject matter specialist to plan evaluation of the course on an ongoing basis.

If administrative responsibilities are included in course developer's role, they could entail:

- preparing, in consultation with the course development administrator, an initial budget and course development schedule, and revising these if necessary after reviewing the course outline;

- ongoing monitoring of each stage of the course preparation process to ensure it is on budget and on schedule;

- monitoring or supervising other administrative tasks related to course development, for example, copyright clearance, acquisition of textbooks, etc.

IMPLEMENTATION PHASE

(Note: "implementation phase" refers to the implementation of the distance education program as a whole, and while this entails delivery of courses, it also includes the ongoing development of other courses.)

- consulting with the subject matter specialist during the first offering of a course, reviewing results of monitoring and feedback, recommending any changes needed immediately if difficulties jeopardize the learners' successful completion of the course, and suggesting changes for subsequent offerings of the course;

- along with the course development administrator, identifying any changes required to the course development process as indicated by any aspect of the course delivery process (for example, feedback from tutors or students may indicate that assignments are unmanageably lengthy and students cannot both complete them and proceed with the next required unit: this may indicate a need to test the assignments for length and complexity before including them);

- preparing recommendations on improving the course development process, based on feedback from other course team members, learners, etc., in order to increase efficiency and effectiveness.

Media specialist:

Commentary: Contractual Arrangements for Media Specialists

The term "media specialist" has come to mean a specialist in non-print media, such as television/video, radio/audio, computer based instruction, computer mediated communication, etc. There are several possible contractual arrangements to obtain the services of a media specialist. In some organizations, media specialists are part of a media unit within the main organization, for example, an audio visual unit, in others, media specialists are full time staff members within a distance education unit, and in some contexts, media specialists are hired on a part-time contract on an as-required basis. The first arrangement is more usual in an established institution for which distance education is the second mode. In this situation, media production is either contracted separately and charged back to the distance education unit, or is considered part of the ongoing organizational role of the audio visual unit and included in the main organization's operating budget. Media specialists are usually full time staff in a single mode distance education institution.

For a new organization with no experience in distance education and limited resources, the best approach at first may be either to use facilities and staff from the main audio visual centre, if there is one, or contract specific projects from an external supplier, if one is available. If the process and budget are carefully monitored, by the time several courses have been developed, those in charge would have a sense of which media seem to be most useful and viable for the types of courses which will be provided at a distance. At that stage, it may be time to consider some longer term contractual arrangements, either with the existing in-house unit, or with an external supplier. Setting up facilities within the distance education unit may be prohibitively costly, depending on the nature of the media and sophistication of the facilities. The cost of setting up a full fledged video studio may be out of reach, but setting up a sound room and equipment for preparing and duplicating audiotapes may be manageable. On the other hand, alternative contractual arrangements may be so costly that it is worthwhile investing in a media unit exclusive to the distance education program. There is one further caveat: technology in electronic media, especially video and computers, is changing so rapidly that it is possible one could be investing in soon-to-be-obsolete equipment.

As for the subject matter specialist and the course developer, the media specialist has core course development responsibilities, and additional responsibilities particular to start up and implementation phases:

START UP PHASE

- recommending to the course development administrator the range of media and their costs, suitable for prospective courses in distance education program, for the course development administrator to consider for inclusion in model budgets and procedures;

- for media available for use in course development, preparation or assembly of information materials for course team members unfamiliar with media use, providing guidance on the most appropriate use of various media, timeframes, costs and logistics involved in production, considerations for student use, such as cost and accessibility;

- if specific media are likely to be used in course development, preparation of information materials and workshops on how to use a given medium, production values for particular media.

CORE COURSE DEVELOPMENT RESPONSIBILITIES

- in consultation with other course development team members, recommending appropriate uses of media for use in the course;

- if administrative responsibilities are also part of role, communicating with course administrators within the distance education unit and at local or regional sites to ensure that facilities and/or equipment are available for media under consideration, and if feasible, making arrangements to have facilities and/or equipment (for example, a VCR player) available as required;

- working with course development team members to plan content and approach for a media production, including script preparation, visuals, ensuring continuity between media components and learning objectives;

- working with course development team members to prepare a schedule and budget for media production;

- in situations in which there are other media team members (for example, camera operators, graphic artists, post production editors, etc.) involved in the production, briefing media team about content and goals of the media component, and serving as liaison between the course development team members and the media team;

- working closely with the course development team and the media team throughout the production process, to ensure best use of the medium, appropriate production values are maintained, learning goals are met, and scheduling and budget are on target;

- if the course is to be piloted, assisting with the planning of the formative evaluation process, especially in relation to evaluating the effectiveness of the use of media, and recommending revisions as appropriate;

- if administrative responsibilities are also part of role, coordinating post production work, planning for duplication of materials and/or broadcast, monitoring process, and checking for quality.

IMPLEMENTATION PHASE

- if administrative responsibilities are part of role, maintaining communication with course administrators and with local or regional site coordinators to ensure that facilities and equipment needed for media use are still available and in good order; providing for repair, replacement as needed;

- consulting with course development members during the first offering of a course, reviewing results of monitoring and feedback of media components, recommending any changes needed immediately if difficulties jeopardize the learners' successful completion of the course, and suggesting changes for subsequent offerings of the course.

ADMINISTRATIVE SUPPORT:

As Hilary Temple points out in "Open Learning in a Changing Climate", from Open Learning in Transition, National Extension College, 1988,

"In neither their traditional nor their new roles can the learner or teacher function without the infrastructure of administrative, counselling and technical support provided by staff who in

conventional systems are regarded, indeed labelled, as ancillary. They, like the teachers, will find their role changed, and even if the increased range of duties and weight of responsibility produces greater job satisfaction, may feel insecure at being plunged into unfamiliar tasks with little by way of precedent and experience - let alone formal training - to guide them."

Yet the administrative support roles are crucial to the successful operation of a distance education program, primarily because they provide the learners' only channel into the education system. Unlike learners in a face to face situation, distance students have no alternative means of bypassing the system to get their message across; for example, they cannot easily contact another source if an enrollment administrator cannot or does not provide necessary information. It is through the administrative staff that almost all of the information, resources and communication is relayed from the educational organization to the student and from the student to the educational organization, including course materials, instruction, assignments, accreditation procedures, examinations, counselling, etc.

A profile of these roles is provided below. Most roles are described as if they were the more senior position of a small group with similar responsibilities. This is for two reasons: in systems in which they are the sole person with that role, they carry all the responsibility for fulfilling that function and for coordination with other units, and in larger organizations, in which there are a number of people carrying out these functions, they would both supervise and carry out their own job functions, since few organizations are large enough to have people in these roles whose sole responsibility is supervision.

Commentary: Staffing Arrangements

At the outset, while the program is quite small and staffing needs are limited, it would be possible to combine several of these roles into one position; for example, information coordinator and enrollment coordinator, student services coordinator and enrollment coordinator, duplication coordinator and dispatch coordinator.

Alternatively, it may be possible to obtain these services by arranging for those within the organization as a whole to provide them, for example, distance education enrollments could be handled within the main registrarial unit, or dispatch could take place from the organization's central mailing facility. The advantage of this arrangement is that it keeps the distance education staff complement small; the disadvantage is that staff in other units may not give priority to the timeframes set by the distance education unit, and it would be more difficult to ensure that students were enrolled on time or received their course materials before the program began. If sufficient support for distance education can be developed among the organization as a whole, and there are sufficient resources available within the main organizational units to serve the administrative needs of distance education, the integrated approach serves to maintain continuity, and makes distance education students more visible to the organization as a whole.

The following roles address the administrative functions required in a distance education unit.

Student services administrator:

Depending on the projected size and rate of growth of the distance education program, a position to coordinate all aspects of administrative service to students may be needed at the very outset, or may evolve over the first few years, as an expansion of the information coordinator or enrollment coordinator's roles, for example. If the student services coordinator is on staff in the distance education unit from the beginning, these would be the first responsibilities:

START UP PHASE

- in consultation with the senior administrator, and with the organization as a whole, developing systems for student enrollment, record keeping, assignments and examinations coordination;[2]

- in consultation with senior administrator, establishing promotional and information program to announce the distance education program to prospective users and to gain support for it within the organization.

In centralized system, also responsible for:

- setting up systems to provide student support at a distance, including tutorial, counselling, library service, using means appropriate to the context and feasible given communications and transportation systems available.[2]

In decentralized systems, also responsible for:

- setting up a system of local and regional sites for tutorials, administration and record keeping, promotion of programs, student counselling, library service, etc.;[2]

- preparation of information materials for staff of local and regional sites about procedures;

- development and delivery of workshops for staff of local and regional sites.

[2]   These responsibilities would be initially shared with the senior administrator, and subsequently handled by the student services coordinator.

IMPLEMENTATION PHASE

- monitoring efficiency and effectiveness of systems for student enrollment, course materials dispatch, assignment and examination handling; identifying and taking action to remedy problems;

- handling liaison with regional and local study centres to ensure that materials, resources and equipment are available;

- reviewing information and training needs of staff at local and regional study centres, preparation of information materials and /or workshops to address those needs;

- handling liaison with coordinator, tutorial services, to ensure continuity between administrative services and academic support services;

- handling liaison with organization as a whole regarding student record systems, student accreditation, financial systems.

Information coordinator/program promotion[3]:

Responsible for:

- promoting program, provision of information to those within and beyond the organization;

- preparing information materials, calendars, course descriptions, information about how to enrol; requires coordination with program administrators regarding accreditation information, cost of courses or programs, any logistical arrangements, etc., with course development staff regarding course description, and any other logistical requirements - access to media or to study centre, or to placement for practicum;

- developing connections with community groups, other educational organizations and public institutions, such as libraries, who are interested in disseminating information about the distance education program;

- preparing and placing advertising about the program;

- preparing press releases, media information regarding program.

3 These responsibilities may be initially handled by the senior administrator, or the student services coordinator, or by an information coordinator within the organization as a whole, but will need a full time staff person if the program is to grow quickly.

Course materials preparation coordinator:

Responsible for:

- preparing finished course materials, in consultation with course development teams and checking for accuracy prior to duplication;

- handling final preparation of print materials, by computer, stencil, etc., coordination with course team members, ensuring proofreading is completed;

- handling ongoing maintenance of existing courses, ensuring course materials masters are kept in good order, ensuring revisions are implemented, copyright permissions are current;

- attending to any other issues that may affect course currency, (e.g. ensuring that texts are available for text-dependent courses).

Course materials duplication coordinator:

Responsible for:

- coordinating duplication of course materials both in house and externally;

- handling liaison with print shop, monitoring pricing, quality and delivery, ensuring materials received on time in good order;

- handling liaison with warehouse/dispatch area to ensure materials ready when they are scheduled to be dispatched.

Course materials warehousing/dispatch coordinator:

Responsible for:

- supervising or monitoring assembly of course components, preparation of courses for distribution to students, either in bulk to regional or local centres, or individually by mail, other means;

- monitoring costs and efficiency of delivery systems used, reporting problems regarding lost materials, delivery time lags to administrative supervisor; liaison with regional/local centres regarding any delivery problems.

Enrollment coordinator:

Responsible for:

- handling student enquiries, providing information about enrollment process to prospective students and to others within the organization;

- managing student enrollment process, ensuring enrollment processing is handled in sufficient time to provide for delivery of materials to students in time for course offering;

- handling receipts of tuition revenue, materials deposits, etc., noting on student record files, forwarding funds to the main organization for deposit;

- working with other units in the organization who are concerned with student registration, e.g. admissions officer, faculties in tertiary institutions;

- recommending systems for enrollment, student records to student services administrator, and developing systems in consultation with student services administrators.

Assignment and examinations coordinator:

Responsible for:

- preparing planning schedule each year for assignment receipt and return for all paced courses;

- providing all tutors with copy of schedule and procedural information and coordinating dispatch and receipt with them;

- receiving and recording student assignments, forwarding to tutors for marking, following up if assignments are not returned from tutor on schedule, recording all student marks, (as back up record), handling student complaints, enquiries.

Examinations (in situations in which examinations are held under controlled circumstances):

- setting up arrangements for local examination centres (if there are no local or regional study centres); ensuring examination supervisors meet qualifications;
- setting up alternative arrangements (e.g. proctors) for any individuals who cannot attend examination centre;
- handling duplication and distribution of examination materials to exam centres ensuring security of exam materials and process;

- receiving returned examination scripts and distributing to tutors or instructors for marking;
- recording marks, ensuring that marks are received by deadline set by central organization.

Local/regional study centre coordinators:

In a decentralized system, in which a number of services are provided directly to distance education students in the district, the staff of the study centres take on a number of the administrative and academic responsibilities that may be coordinated by a central administrative unit, for example, assignment coordination, recruiting tutors, provision of academic counselling, etc.

The study centre coordinator serves as a primary link among staff of the study centre, the main distance education centre, and the learners. Responsibilities include:

START UP PHASE

- identifying (possibly in consultation with senior administrator) appropriate location for study centre, negotiating with host institution (if centre is in a local institution) regarding rental rates, provision of services and equipment, working hours, security, etc.;

- organizing set up of study centre, obtaining equipment and supplies;

- identifying (along with student services administrator and tutorial administrator) staffing needs, recruiting and hiring appropriate staff;

- providing information and publicity about the local centre and the services it will provide (in consultation with information/promotions coordinator);

- coordinating (along with student services administrator) systems for enrolling learners, receiving payments, dispatching materials.

IMPLEMENTATION PHASE

- coordinating work of local staff providing administrative and academic services to local students;

- coordinating workshops on tutoring and counselling;

- serving as an information resource and academic counsellor for current and prospective students;

- in situations in which course materials are duplicated locally, coordinating the receipt of master materials, translation, if required, and duplication and dispatch to students.

ACADEMIC SUPPORT:

Tutorial services/student counselling coordinator:

This individual is responsible for overseeing academic services provided to learners, including tutoring, assignment marking, on site sessions, academic student counselling. This is a somewhat different role than that of the student services administrator, who is responsible for ensuring the effectiveness of all the administrative systems that serve students. Depending on the organizational structure and goals,

there may be some overlap between tutorial services and administrative services coordination, but, especially in a decentralized organization, it is important to have one individual responsible for coordinating the work of tutorial staff and academic counsellors.

Initially, this role may be that of student advisor/student counsellor, and it may expand into the role of tutorial services administrator. However, if the distance education program is planned for rapid expansion, it would be advisable to have this position as part of the staff complement from the outset.

Responsibilities include:

START UP PHASE

- preparing job outlines for tutors, including required qualifications and attributes, responsibilities;

- providing information and academic counselling to prospective students enquiring about program.

In centralized system:

- providing information, making recommendations for hiring tutors to relevant academic departments.

In decentralized system:

- in consultation with the senior administrator and with local and regional site coordinators (and with the relevant academic department, if required), identifying and recruiting tutors for local and regional sites;

- providing information materials and workshops on academic counselling to local and regional staff who will be meeting prospective students.

IMPLEMENTATION PHASE

- providing information and workshops for training in tutoring and academic counselling to tutors and others in the distance education program;

- providing information and academic counselling to current and prospective students enquiring about program.

In centralized system:

- serving as liaison between academic departments in main organization and administrative services of distance education unit.

In decentralized system:

- serving as liaison on issues related to tutoring and counselling among: academic departments in main organization, central distance education unit and local and regional study centres.

Tutors and instructors:

These individuals serve as the primary instructional contact for distance learners. Depending on the organizational structure and goals, the subject matter specialist who prepared a given course may also be the instructor and/or supervisor of tutors for that course. Tutors may be individuals who already have full time teaching appointments within the organization and who take on distance teaching responsibilities in addition to their regular workload; they may be part time instructors, they may be associated with the organization as graduate students or research assistants, or they may be graduates who have some teaching experience, and who live near local or regional study centres, or who live near the main institution, and are contracted to tutor on a part time basis. Their responsibilities would include:

START UP PHASE

- developing familiarity with course materials (if the tutor has not had a role in course authorship);

- obtaining a general profile of prospective students, their learning needs and goals, circumstances;

- learning about principles of distance education and distance education tutoring, by reading, participation in workshops.

IMPLEMENTATION PHASE

- coordinating with enrollment coordinator and assignments coordinator about number of students assigned, assignment scheduling, procedural requirements;

- where feasible, contacting students as they are beginning work on the course, to identify any concerns, questions, and to establish a personal connection with students;

- receiving and marking assignments and forwarding marks to appropriate person (usually an assignments coordinator) who records them on student record systems;

- may prepare supplementary learning materials for distribution to students, for example, model answers, copies of exceptional student work, general commentaries about the assignments, common errors;

- discussing any serious issues related to student work (e.g. possibility of plagiarism) with tutorial supervisor or with academic supervisor;

- may have input into examination content, depending on allocation of responsibilities with course author or academic department;

- receiving and marking final examinations and forwarding marks to appropriate person (usually an assignments coordinator) who records them on student record systems;

- noting any serious and consistent difficulties learners have with the course, and bringing these to the attention of the course development team; assisting with remedial work on the course materials if required;

- may participate in evaluation of course materials.

Library services coordinator:

Library services may or may not be included as part of the distance education program. There are several schools of thought on this question. In an academic program, it is sometimes felt that learners should take the initiative to explore beyond the course materials provided, and refer to current literature when preparing papers. Others feel that any materials required for successful completion of the course should be included in the course materials, either as a text or as a reprint, and requiring learners to conduct library based research puts at a disadvantage those who do not have adequate access to these facilities. A third position recommends that learners have the opportunity to exercise some choice in their program, and provision for this is made by making available relevant resource materials on a variety of topics, that learners can select and obtain as needed, from the central library of the organization, as a package of reprints from the distance education unit, or from a special collection made available at local study centres.

If these options are to be made available for distance education, coordination will be required with the library at the main institution. Some distance education organizations designate one individual within the main library to serve the needs of distance students, others include serving distance students as part of the library's mandate, and still others develop mini-libraries which are assembled and shipped to the local study centres. However, in a dual mode system, it is most likely that the library services coordinator would be someone whose main responsibilities are with the main library of the institution, and who has additional responsibilities related to distance education. These are likely to be:

START UP PHASE

- advising senior administrator and course development manager on possible library services available for distance education, given resources and constraints available;

- working with senior administrator and course development manager to establish viable systems to provide library services for distance education;

- working with course development manager and course team members to identify library needs for any courses under development and to address ways of meeting those needs.

In a decentralized system:

- working with senior administrator and coordinators of local and regional centres to identify viable systems to provide library services for distance education on a local and regional basis.

IMPLEMENTATION PHASE

- providing agreed upon library service to distance students;

- monitoring efficiency of library service for distance students, identifying any difficulties that require immediate attention, noting those that require changes to procedures on the longer term.

In decentralized system:

- serving as a resource for local and regional site coordinators about library services.

IV.   GUIDE TO THE CHARTS OF TASKS, ROLES AND COMPETENCIES

The chart is intended to be read in conjunction with the report on Roles and Competencies in Distance Education. It can be used as is as a guideline for planning, or can also be used as a planning exercise, in which members of an organization determine the tasks and staffing requirements depending on the needs of their organization.

Institutional profile/context. This column describes the stage of distance education of the organization. The required tasks, roles and competencies depend on the size, complexity and length of experience in distance education. The two sample charts present two different scenarios: Context A profiles a new or young small organization; Context B presents a larger, more experienced organization. If the chart is to be used as a planning exercise, one can elaborate the institutional profile by using the letters assigned to each attribute, and then determine how that affects the competencies required. For example: -Distance education history may be A, new; B, young, from 1-5 year; or C, experienced, over 5 years. -Size of distance student body may be A, under 1,000; B, between 1,000 and 5,000; or C, over 5,000. -Staff complement, of the institution as a whole, may be A, under 200; B, 200-500; or C, over 500. There are many possible combinations of these factors: for the sake of simplicity, the two sample charts assume two possible scenarios: 1. a new or young organization with between 1,000 and 5,000 distance students, and an organizational staff of under 200, and 2. a young or experienced organization with over 5,000 students and an organizational staff of between 200 and 500. The institutional context for 1 can be described as ABA or BBA, and for 2. can be BCC or CCC. Using the sample charts as a guideline, organizational planners can determine to what extent size and experience (and any other contextual factors particular to their situation) affect their task and staffing needs.

This arrangement should also accommodate both single and dual mode organizations. In a dual mode institution, the total staff complement would be in a higher category (B or C) in proportion to the number of distance students, who may be in the A range at the outset. This accommodates the fact that the organization may be fairly large and complex, even if distance education is a new venture. But in a single mode institution, the total staff complement will increase along with the distance student enrolment, and the organization as a whole will move from the smaller, simpler category (AAA, for example) to a larger, more complex category (BCC, for example), perhaps quite rapidly.

Tasks are grouped under five major headings: Policy Making, Planning and Management, Research and Evaluation, Materials Development, Student Services. These are elaborated in the report.

Roles listed are elaborated in the report.

Competencies are assigned numbers on the chart, in order to facilitate their placement under several categories. The numbers correspond to the following competencies listed in the report: 1. Leadership; 2. Administrative skills; 3. Teaching/Course Development; 4. Teaching/Student Support; 5. Logistics, 6. Research and Evaluation.

In the chart the levels of competencies are listed as basic awareness, familiarity with the basic principles; decision-making, an overview of the field which is sufficient for decision-making, and then two levels of practitioner - competent, sufficient skills and knowledge to be able to work without close direction; and advanced, sufficient skills and knowledge to be able to train others and to provide an overview to decision makers and planners.

Note that research and evaluation are included both as a task and as a competency. Research and evaluation are described in the report as tasks which may be taken on by a number of people in the organization, recognizing that there are few organizations which sustain full time researchers in distance education and that research and evaluation are an important aspect of a distance education program.

Publications consulted for this report:

Administration of Distance Teaching Institutions, Tony Dodds, International Extension College, Cambridge, 1983.

Development, Design and Distance Education, Michael Parer, Centre for Distance Learning, Monash University, Gippsland, 1989.

Distance Education in Single and Dual Mode Universities, edited by Ian Mugridge, The Commonwealth of Learning, 1992.

Distance Education at the University of the West Indies, W. Renwick, C. Rao, D. Shale, The Commonwealth of Learning, 1992.

Distance Teaching, Prerequisites and Practices, Block 1, Indira Gandhi National Open University, 1988.

How to Develop and Manage an Open Learning Scheme, Roger Lewis, National Council on Educational Technology, Coventry, 1985.

Low Intervention Course Design: An Appropriate Technology Approach to Distance Education? Jennifer O'Rourke, in Proceedings of The Student, The Community and The Curriculum, International Perspectives on Open and Distance Learning, Cambridge, 1991.

Open Learning in Transition: An Agenda for Action, edited by Nigel Paine, National Extension College, Cambridge, 1988.

The Planning and Management of Distance Education, Greville Rumble, London, Croom Helm, 1988.

Perspectives on Distance Education: Report on a Round Table on Training Distance Educators, The Commonwealth of Learning, 1990.

Professional Preparation and Staff Development for Academics Working in Distance Education, Michael Parer and Robyn Benson, Centre for Distance Learning, Monash University, Gippsland, 1990.