PERSPECTIVES ON DISTANCE EDUCATION

Report of a Round Table on Training Distance Educators convened by The Commonwealth of Learning in Vancouver, April 2-6, 1990

Published by
The Commonwealth of Learning, Vancouver, 1990
Acknowledgements

We are grateful to the Indira Gandhi National Open University, the Industrial Training Research Unit and Unesco for permission to reproduce copyright materials. Thanks are also due to Professor Peter Kinyanjui who organised and serviced the Round Table and to Ms. Janet Jenkins who compiled the report and prepared the summary chapters.

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ISBN 1-895369-07-X

Design by Betty Sommerville
Printed by Benwell-Atkins Ltd.
Published by The Commonwealth of Learning, 300-800 Hornby Street, Vancouver, B.C. Canada V6Z 2C5
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The Commonwealth of Learning was established on 1 September 1988 by a Memorandum of Understanding agreed by Commonwealth Governments. It was established as an international organisation with member countries of the Commonwealth, through their Governments, as participants. The Memorandum of Understanding describes the purpose of the Agency as follows:

The purpose of the Agency is to create and widen access to opportunities for learning, by promoting cooperation between universities, colleges and other educational institutions throughout the Commonwealth, making use of the potential offered by distance education and by the application of communication technologies to education. The Agency’s activities will aim to strengthen member countries’ capacities to develop the human resources required for their economic and social development, and will give priority to those developmental needs to which Commonwealth cooperation can be applied. The Agency will work in a flexible manner and be capable of responding effectively to changing needs. It will serve the interests of Commonwealth member countries and of the Commonwealth itself, working in cooperation with Governments and other Commonwealth agencies and educational institutions and doing so in a way that is consistent with the principles that have guided the Commonwealth. In performing its functions the Agency will seek to ensure the appropriateness of programmes and of distance-education techniques and technologies to the particular requirements of member countries.
Foreword

This report records the views of several well known educators from various parts of the Commonwealth on how training needs relating to distance education may best be addressed by The Commonwealth of Learning (COL).

We greatly value the advice and indeed have already incorporated into our strategic plan several of the ideas which emerged from the Round Table.

It was thought that the ideas and suggestions merited an audience wider than COL, hence this publication. We are confident that it will prove useful to all who are involved in distance education and especially those directly responsible for related training activities.

If sound, worthwhile distance education programmes are to be established, it is imperative that those responsible for the development and management of such programmes be adequately trained in particular skills and techniques which have been elaborated upon in this volume.

The Commonwealth of Learning records its appreciation to all who have contributed to the publication and will continue its efforts in supporting the training of key people throughout the Commonwealth as distance education comes to occupy an increasingly important place in national educational systems.

James A. Maraj
President
The Commonwealth of Learning
CHAPTER 1

INTRODUCTION

The Commonwealth of Learning (COL) has as one of its main functions, as defined in its Memorandum of Understanding, to undertake and support staff training in the techniques and management of distance education. In order to identify priorities and plan our strategy, COL convened a Round Table on Training. The Round Table had the following objectives:
1. To identify the training needs of distance education institutions in the Commonwealth countries;
2. To discuss and recommend strategies to meet these training needs;
3. To examine the efficacy of the various types and levels of training; and
4. To evolve an approach for effective cooperation among various institutions, agencies and countries and COL’s role in it.

The meeting took place in Vancouver at The Commonwealth of Learning from April 2-6, 1990. It was attended by twelve specially invited participants, each from a different country; Professor G Ram Reddy, Vice President of The Commonwealth of Learning, was in the chair and Professor Peter Kinyanjui, Senior Programme Officer, serviced the meeting. Dr. James Maraj, the President of COL, gave the opening address and other COL staff attended particular sessions*.

KEY THEMES

The papers presented to the Round Table form the basis of this report. The first, ‘The Training of Staff for Distance Education Systems’, was an overarching analysis from COL. ‘All staff working or intending to work in a distance education system require orientation and training’. From this unequivocal beginning, Peter Kinyanjui goes on to discuss in his overview how training may be provided. He suggests that there are three priority areas of need: planning and management of distance education institutions; instructional design and course development; and application of new technologies, including computers. He goes on to describe how training could occur as a continuous process.

Many institutions, particularly new ones, seek on-the-job training for their staff. A number of courses and materials already exist and ways need to be found to increase their potential impact. Two suggestions are made, first to concentrate on training trainers, and second to develop common outlines for training courses.

Tom Prebble focusses on the first of the key areas defined by Peter Kinyanjui, policy planning and management. He sees distance education as ‘a practical challenge, which is open to any number of solutions’. He argues that planners and managers need practical training, to help them adapt old skills to new challenges. Training strategies should include degree or diploma pro-

* A full list of participants is included as Appendix A.
programmes, workshops – especially regional ones, allowing international exchange of experience – use of manuals, and training attachments and fellowships. Senior managers, in particular, need the broad experience which can be gained from visiting other institutions.

B N Koul addresses the area of instructional design and course development. Like Peter Kinyanjui, he suggests that training should be in stages and be available to all key staff. As an example of what is needed, he quotes from a study conducted at his University, the Indira Gandhi National Open University. The training needs of different categories of staff were identified through a survey of the staff concerned. Besides such on-the-job training, B N Koul makes the case for pre-service training – courses in distance education for those who may be interested in embarking on a career related to distance education. He also discusses the training of trainers. He suggests that standard courses could be made available for all these categories of training; different personnel would follow a different selection of training modules from a single set. The chapter concludes by suggesting a strategy by which COL, in collaboration with others, could develop such a training programme.

A W Bates focuses on the application of new technologies. He points to the need to be open to change. ‘Probably no other area of distance education is developing more rapidly than the application of technology to both teaching and administration’. But older technologies are often underexploited and new ones misused. Training in their application can help managers to decide what technologies to use and practitioners to learn how to use them. There are special problems in training, arising from the rapidity of development in the field and from the need to include hands-on experience as part of training. But a strategy for selecting media is suggested which may be used in any context. The chapter ends with a proposal for the preparation of a core of training materials on applications of technology, themselves using a wide range of media, and possibly forming part of a diploma or Master’s course in distance education.

G Dhanarajan tackles the topic of the adoption and adaptation of course materials through a case study of Hong Kong’s Open Learning Institute. This newly established institution imports most of its courses from external sources. Staff must, therefore, be trained to adapt and use materials produced elsewhere. In addition to skills needed for other forms of distance education, ‘staff must exhibit great senstivity to local learners’ needs and abilities, their learning environment, programme and course relevance, and the cost and transportability of courses’. A detailed breakdown of the training needs of different categories of staff is followed by a list of problems encountered in implementing training. Existing training materials tend to need adaptation prior to use in Hong Kong, and the chapter ends with a plea for the development of generic training materials.

My own chapter focusses on collaboration in staff training*. It starts from the premise that all staff in distance education need training, and that training for permanent professional staff should be continuous and in stages. A diagrammatic training model is used to explain how collaborative approaches can extend the scope of training each institution can provide. Barriers to collaboration are discussed. To improve collaboration, information and consultation about training are necessary; resources must be available, and there must be

* At the time of the Round Table, Janet Jenkins was on the staff of the International Extension College. She has since joined The Commonwealth of Learning.
flexibility over how they may be used; there must be mobility between partners; and finally there must be strong commitment to training within the institutions conducting distance education.

Each of these themes was discussed at length, and conclusions and recommendations are included in the last chapter.

**TRAINING NEEDS: THE VIEW FROM THE FIELD**

A number of case studies were also prepared for the Round Table*. The representatives of distance education institutions explained their training needs and made suggestions as to how they might be met. As the first objective of the meeting was to identify training needs, it is appropriate to consider here the views of these practitioners.

1. The Department of Extension Studies
   The University of Papua New Guinea – Howard Van Tresse

   The Department of Extension Studies at UPNG is part of the Education Faculty. It consists of an administrative and course development unit located on the main campus in Port Moresby and a network of nine University Centres. It is envisaged that one Centre should be established in each of the country’s nineteen provinces. The Department operates its programmes during the normal two semesters of the University’s academic year and runs, in addition, a six-week summer session. Enrolments have increased dramatically in recent years – up over 500% since 1985, to just under 5000 in 1989.

   The Department has three categories of staff: academic, administrative and clerical. The academic staff include Course Coordinators based on the main campus and Directors of University Centres in the provinces. At present, only the campus Department has administrative staff, though as Centres grow and develop, additional administrative support may be required there as well. Both the campus Department and University Centres have clerical staff.

   The academic staff located on the main campus are involved primarily in course development. They have full responsibility for preparing and running the University’s Adult Matriculation programme and assist teaching departments to externalise courses at degree and diploma levels. At present the Department has course coordinators in language, science, social science, mathematics and education. A Coordinator of Course Development is responsible for overall editing and preparation of materials for printing.

   In recruiting Course Coordinators, the Department requires at least a Masters degree in the specific academic area and, ideally, experience in writing distance teaching materials. Unfortunately, the Department has almost never received applications from people who have been involved in distance education. As a result, work in the field of course curriculum development and proven writing ability are usually accepted as sufficient. New appointments, therefore, must adapt their writing skills to the production of distance education materials. The Department has no formal training programme, but attempts to assist new staff on an individual basis.

   At present, all Course Coordinators are expatriates. Attempts to attract qualified national graduates to the five coordinators’ positions have met with little success. Extension Studies by its very nature with its emphasis on writing skills makes it difficult to attract qualified people, whether national or expatriate. The University has a programme of recruiting Teaching Fellows from

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* Chapter 6 is also largely in the form of a case study.
among honours graduates who usually spend from one to two years in departments prior to going overseas for further study. Two Teaching Fellows were appointed to understudy the language and mathematics Coordinators respectively, but both left the Department to return to regular teaching. It seems that the decision not to continue with Extension Studies was due in one case to a lack of confidence in writing skills and in the other to the feeling that the Department did not offer the desired academic career path.

Recently, the Faculty adopted a new strategy which it is hoped will help to attract suitably qualified national academics into the Department. In addition to an honours degree, it has been agreed that individuals with high quality academic performance at undergraduate level plus relevant post graduate professional training and experience will also be acceptable for appointment as Teaching Fellows. It is hoped that this will attract some of the skilled university graduates already in the workforce especially those in the teaching profession.

In preparation, a Teaching Fellow would be expected to work with the Course Coordinator in his/her respective field, gaining initial experience and skill in the preparation of distance learning materials and their use. Following the successful completion of a programme of courses available at UPNG to upgrade any academic deficiencies, the Teaching Fellow would enrol in a Master's degree programme overseas in his/her specific academic field. It is expected that further training and/or upgrading in specific techniques relating to distance education would be provided at a later date, after the Teaching Fellow has returned and spent a bit more time working in the Department.

It can also be expected that national Course Coordinators might also aspire to attaining a Ph D. This would, indeed, be encouraged by the University. Since they would be academics in their own right, they would most likely choose to study in their own particular subject area, rather than in distance education.

Academic staff located in the University Centres (i.e. Centre Directors) are required to deal with both administrative and academic matters. In addition to looking after the general running of the Centre, Directors are involved in such tasks as tutoring, counselling students, recruiting and monitoring the work of local tutors, organizing seminars and workshops, and carrying out and monitoring research projects.

In recruiting Centre Directors, the Department has adopted the following criteria: a good first degree, proven administrative experience and knowledge of the particular province. Teaching experience is desirable as well as work in adult or continuing education. Clearly, the position requires a mature experienced individual, rather than a young new university graduate.

In addition to further study in their own particular academic fields, Centre Directors are encouraged to consider one of the diploma programmes offered overseas in distance and continuing education. It is also hoped that short attachments to established distance education institutions can also be arranged. Except for guidance and advice from members of the Department, no formal training programme is available at UPNG.

The administrative staff in Extension Studies are involved in three areas: student administration, University Centres' administration and accounts. It should be noted that the administrative staff in the Extension Studies Department are part of the larger University administration, thus a certain amount of intradepartmental staff movement takes place. The Department sees this as an advantage over the long run, since it means administrative staff throughout the University will gain a greater familiarity and acceptance of Extension Studies.

The student administration unit consists of an Assistant Registrar, Graduate Assistant and clerk/typist. Their main tasks are to process registration forms,
respond to administrative queries from students, coordinate examinations and process final results.

The administration of University Centres is carried out by the Extension Studies Coordinator with the help of a Despatch Clerk. Tasks include the processing of forms relating to the hiring and paying of part-time tutors; coordinating the printing, storage and despatch of materials; coordinating the receipt, marking and despatch of assignments; and liaising with Centre Directors on various administrative matters.

In recruiting administrative staff, the Department looks for individuals with proven administrative ability. While Extension Studies has its own special administrative requirements, there is nothing about the systems or procedures that any competent administrator should not be able to learn. Nevertheless, further training and upgrading is considered desirable and needed.

Opportunities should be given to staff to improve their general administrative skills by attending appropriate in-country courses. Staff should also be given the opportunity to attend appropriate courses abroad which deal specifically with the administration of Distance Education with the aim of bringing new ideas and innovations into the Department.

In addition, all staff should be given the opportunity to become familiar with the use of appropriate computer technology.

In the main campus Department, secretarial/clerical staff are involved in either course production or carry out general clerical duties. In the University Centres, secretaries have a significant administrative support role to play. Course production and most normal office typing is now done almost entirely on word processors. Thus, all typists need regular training and upgrading in this skill to take advantage of new technology.

2. Training for Distance Education: Kenya’s Experience – Ben Gitau

In Kenya, training for distance education arose from the need to have a body of specialised personnel to man the various facets of the programme. Public distance education institutions did not exist in Kenya until the year 1967 when the then Correspondence Course Unit was established with the assistance of the United States Agency for International Development (USAID). One of the expressed objectives of this programme was that, by the expiry of the contract between the USAID and the University of Nairobi, the latter would have built up the capability to run the distance education programme. Furthermore with the development of each subsequent distance education programme, it has become necessary to re-orient, re-organise or re-institute a training programme to meet the latter’s specific needs. Experience shows that each programme has its specific and unique training needs. There is therefore no standard form of training; it varies with the nature of a programme.

The onset, in 1986, of the first degree by external studies brought a new dimension to the training needs in distance education. The introduction of the degree added other cadres of personnel who needed training in distance education, namely university lecturers. Thus the cadres that needed training in distance education now include:

- writers
- editors
- reviewers
- support staff
The training of writers has progressed well in Kenya. Writers are trained in format, style, didactic instruction, language and simple aspects of copy editing. It has been found that various forums suit various forms of training programmes. It has been found, for example, that while a one-to-one approach is suitable to the needs of pre-university programmes and also in-service courses for untrained teachers, a workshop forum is the best for university level programmes like the current external degree of the University of Nairobi.

Lecturers at the university are busy people and they prefer a 'retreat' situation to be able to concentrate on their writing. For pre-university courses, workshops of up to two days are organised but it has been found that individual briefs play a vital role. Editors, too need training. They need training in content editing, copy editing and distance teaching editing namely adapting material into distance education form. In our programmes, it has been found that training editors alongside writers is a very practical approach. Those who review and vet materials also need training in the same areas as the writers. So far no viable training has been organised per se for reviewers and this remains an unmet need. Another category of personnel that need training include support staff. These include staff working in typing, mailing, accounts, stores, records and printing. In our situation it has only been possible to give them training on the job. No pre-service training has been possible either for reasons of lack of resources and time since they have to be available all the time at their workplaces. It has however been possible to train a few of the technical personnel on day release basis and one or two have had a chance to travel overseas to train. However, this cadre of staff have had little access to training despite the great need for it. Training at the degree level is still non-existent and we have been sending staff overseas to study for higher degrees. Degree level training is required in administration and management of distance education institution/organisations, course development and writing, editing new technologies, instructional design and theoretical conceptualisation.

3. Correspondence and Open Studies Institute, University of Lagos, Nigeria – E O Fagbamiye

The Correspondence and Open Studies Institute runs degree programmes in science education, business administration and accounting as well as a diploma programme in education and a preparatory programme in science education. There are plans to introduce diploma and certificate programmes in mass communication and community health. Our rationale for training revolves around training our own staff so that they in turn can train course-text writers in various subject areas and edit what has been written. Furthermore, each trainer should be able to moderate course-texts written in his/her area of specialisation. Each trainer should be trained to evaluate the course-texts being used by distant learners. More specialised training is also needed in computer applications for accounting, student records and general administration, narrowcasting, broadcast formal writing and production.

Two of our staff have undergone some training at the International Extension College. These staff are responsible for training our part-time lecturers who write course-texts for us. Nevertheless, all our staff, in the Academic Planning and Development Unit need more training so that they can function more effectively. The areas of need for this category of staff is in editing of course-texts, selection of material for narrowcasting, broadcasting and evaluation of the course texts in use. The media staff need specialised training in script writing for narrowcasting, broadcasting, composing course material using com-
puters and computer application for the administrative staff, so that record
keeping for large numbers of students can be done in an orderly manner that
would ensure retrieval with ease.

4. Distance Education: Possibilities for Growth and Development at Sir Arthur Lewis Community College –

Leton Thomas

The Sir Arthur Lewis Community College in Saint Lucia is in a rather different
position. The College has been given a mandate to:
• provide a new orientation for post-secondary and tertiary education;
• ensure that a wide cross-section of the community can have access to further
  and higher education;
• make possible as a matter of urgency the early stages of university education;
• prepare middle level persons for the world of work.

The College’s Department of Continuing Education has an important role
in extending education to the community, and plans to use distance education
to do so. St. Lucia has never before operated its own distance education
programme.

The Department of Continuing Education has completed one full year since
its establishment and has been able to offer 47 evening courses to over 600 per-
sons. In addition, it has run workshops and short term courses ranging from
one or two weeks to three months for over 260 participants. This is a significant
development and the evidence is that the demand will continue.

The success of the Department’s work in making some of the facilities and
programmes of the College accessible to the community, has created a need for
the College to extend its programmes to communities outside urban Castries.
The College is therefore (a) exploring ways of establishing centres in various
parts of the island; (b) examining distance education techniques which can be
used in the delivery of programmes/courses to our districts and communities
and (c) considering carefully the mechanism which needs to be set up to sustain
an effective and well coordinated outreach programme. It is envisaged that the
following groups stand to benefit from the College’s outreach programme:
• facilitators in the islands literacy programme
• farmers, fishermen etc interested in co-operatives education
• teachers in-service who need advanced training and qualifications
• persons in small businesses and commercial activities

In all this, the need for training staff to operate a distance education system
is paramount.

Most of the people who are recruited to the College as full-time members of
the teaching staff, are selected on the strength of their particular qualifications/
expertise in a discipline. Seventy percent of those who teach courses in the
evening programmes run by the Department of Continuing Education are full-
time members of staff of the College. With the exception of teachers in the
Division of Teacher Education and Educational Administration, many of the
teachers in other divisions have not pursued professional courses in education
and so the need for the development of skills in the following areas is great
indeed:
• writing performance objectives
• organising courses in a modular format
• writing and producing self-instructional materials
• measurement and evaluation
In short, a large percentage of the full-time staff, because they are likely to be involved in Distance Education programmes, would need training in the skills identified.

A second area of training would seem to be the need for teachers to study the characteristics of distance learners, distance learning, the strengths and weaknesses of various forms of distance education delivery techniques; the mix of techniques which in a particular situation make for effective distance teaching and learning. In view of the fact that the majority of teachers have come through situations of face-to-face tuition, they need to be exposed to the areas suggested. In particular, methods of training should ensure that trainers pursue at least one course or one topic within a course through the distance teaching mode in order to internalise the experience.

A third area of training intended specifically for all administrators of distance teaching systems, should enable participants to work out administrative arrangements for distance teaching including feedback, evaluation and record keeping. They should in addition have some exposure to skills and concepts identified above, and be able to organise orientation programmes for new teachers to the system.

THE CASE FOR TRAINING

The case studies confirm the need for training amongst all categories of staff in distance education – managerial, academic, administrative, technical and clerical. These categories can be further subdivided into a few who will make a career in distance education and the rest who spend a few years in distance education or who only work in it part time.

These categories have different training needs, but they share the need for basic orientation to distance education. Most personnel had no previous experience of distance education when they joined their institutions.

It is perhaps useful here to comment on the use of the term training. We use it to describe the acquisition of knowledge and skills that people who work in distance education need. But we realise that the term is not entirely satisfactory. Many academics, who may be distinguished scholars in their specialisms, become involved in distance education as course writers and find unwelcome the idea that they may need training. Activities under the name of orientation or professional development may be more palatable. Training, however, remains the most appropriate term for general use, whatever name it goes under in individual cases.

Those coming to distance education with an academic background will not only need orientation to distance education. If they are concerned with course development, they will need training in writing or editing and in the use of technology – narrowcasting, broadcasting, and the use of computers. (Narrowcasting refers to the use of recorded audio or video.)

Academic staff may also need training in administration, tuition at a distance and counselling. Centre Directors at the University of Papua New Guinea, for example, must develop these skills.

A number of important issues are raised in the case studies. A major recurring theme is that of commitment – commitment from employers and commitment from employees. Employers need to give priority to training. It was suggested in discussion that managers of distance teaching institutions should be expected to support the training of staff at all levels as an integral part of their responsibilities. Commitment from staff, especially those who will remain working in distance education for some years, is also important and has to be...
actively encouraged. At the University of Papua New Guinea, for example, training for academics that holds out possibilities for career advancement could foster commitment to distance education. For similar reasons, the University of Nairobi is interested in advanced courses leading to qualifications in distance education.

Several institutions see staff training, at least for senior professionals, as a continuous process, with more specialist and advanced training occurring at different points in a career. They also suggest that training should be conducted through a variety of modes - including, appropriately, training at a distance.

We can conclude from the case studies that training programmes should have the following characteristics:
- suited to the need of the institution
- available to all categories of staff
- suited to the experience of the staff
- provides a sequence of training opportunities
- offers scope for career advancement
- employs a variety of strategies.

Several institutions already provide their own in-house training. They need support, in the form of high quality materials and of advanced training of trainers, to enable them to do it better. They also need opportunities for some staff to be trained outside and others to study at a distance. All these modes of training will continue to be necessary. Different institutional contexts and different patterns of staffing mean that training has to differ from place to place.

All distance education institutions, however, need staff with skills in the following areas:
- course planning (including media selection)
- development and production of materials in a variety of media
- counselling and teaching at a distance
- management and administration
- research and evaluation

The acquisition of these skills requires a combination of theoretical understanding and practical competence, underpinned by a thorough understanding of distance education.

The chapters that follow explore how such training can best be provided. The result, in the concluding chapter, is a blueprint for the future.
CHAPTER 2

THE TRAINING OF STAFF FOR DISTANCE EDUCATION SYSTEMS: A CONTINUING PROCESS

Peter Kinyanjui

THE CASE FOR TRAINING

Staff training in the techniques and management of distance education is one of the functions of The Commonwealth of Learning (COL) as set out in its Memorandum of Understanding. This has arisen from one of the recommendations contained in the Briggs Report Towards A Commonwealth of Learning which states:

“A first need is for staff training. Much training in the techniques of distance education has been done on the job, although short courses have been offered at various institutions in Australia, Britain and Canada. As distance education has grown, so has the demand for professional training. This comes both from educators working full time in distance education and from regular lecturers and teachers who need to learn the particular skills of writing for distant students and of tutoring them. It has often been necessary for staff to travel abroad in order to acquire these skills.” (paragraph 138)

Distance education is a relatively new field and most of its practitioners have come from formal education systems. By its very nature and scope, distance education requires teams of people performing different tasks and working at different levels to accomplish a common institutional or organisational goal. Hence all staff working or intending to work in a distance education system require orientation and training in order to equip them with professional knowledge, skills, attitudes and approaches which are appropriate to distance education.

PROBLEMS AND CONSTRAINTS

Over the last twenty years or so, the entire field of distance education has undergone considerable growth and rapid changes. The changes have been accelerated even further by advances made possible by the range and types of technologies available today. All these factors have major implications for the training of distance educators who are required not only to maintain the systems already established but also to keep pace with the changing technologies.

Relatively young distance education institutions are faced with many problems and constraints in their attempts to train staff in the various skills, and have often turned to older institutions for assistance. Major problems and constraints include the following:
• Shortage of knowledgeable and experienced trainers in distance education;
• Many distance education systems are set up in a hurry and without adequate training for personnel;
• Once engaged, staff cannot be released for long periods to undergo training;
• Insufficient sample training materials and course outlines developed elsewhere;
• A large proportion of staff are engaged part-time and others on a piece-work basis, and hence any training required can only be provided on site;
• Training courses offered overseas are very expensive and are able to cater for only one or two persons at a time from one institution or country.

It seems therefore that never institutions can benefit a great deal from on-site and on-the-job training programmes and activities, utilising materials which are packaged in flexible and useable forms, and making use of local trainers with or without assistance from outside.

PRIORITY AREAS OF TRAINING IN DISTANCE EDUCATION

Training priorities in distance education, with particular reference to developing countries, appear to be in three main areas. The three are:
1. Planning and management of distance education institutions
2. Instructional design and course development
3. Application of new technologies (including computers) in distance education

In each of these areas, there are certain key people who require particular knowledge and skills for effective operation of any distance education system. They all require training at one stage or other, either through pre-service or in-service courses, full-time or part-time, formally or informally, on-the-job or off-site, depending on the circumstances of the individuals or the institutions concerned.

The types and levels of courses given to these people will also vary, depending on the set objectives, the content, methods used and the time available for conducting the courses. In some cases the training may include a combination of different courses using different strategies. In brief, it is possible to identify at least four settings in which the training of distance educators takes place.

These are:
• Induction/Orientation
• General Basic Training
• Specialist Training
• Professional Training

Table 2.1 attempts to summarise a possible training model which takes account of the various categories of staff and their main functions, and the different settings in which their training might be conducted.

It should be noted here that the chapter does not deal with the broad (but equally important) area of tutoring, counselling or related student support services. The training of staff involved in the provision of these services will therefore need to be addressed separately.
TABLE 2.1 A Training Model of Distance Educators in Different Settings

SOME EXAMPLES OF TRAINING COURSES AND MATERIALS

There is within the Commonwealth countries a wide variety of training courses, handbooks and materials which have been developed for specific purposes and audiences. It would therefore seem logical to start the process of development of common course outlines by identifying the training materials in existence and confirming their accessibility. Examples of existing training materials and courses include the following:

1. University of Nairobi, Kenya
   College of Education and External Studies handbooks used in series of training workshops for course writers, editors, tutors, audio script writers and administrators. These workshops have been conducted since 1985 and participants have included people from Kenya, Uganda, Tanzania, Zimbabwe, Zambia, Namibia and Somalia.

   Has developed a series of training manuals aimed at institutions with limited resources particularly in the third world countries. The manuals are on Course Development, Administration, Practical Research and Course Writing.

3. Distance Learning Association of Southern Africa
   Has facilitated cooperation and sharing of materials between Botswana, Lesotho and Swaziland on a continuing basis since 1972.

4. National Council for Education Research and Technology, India
   Has organised a series of training seminars for staff of various distance education institutions in India. Subjects covered include course writing, tutor-marking, management and organisation, and setting up study centres.
5. Indira Gandhi National Open University, New Delhi, India

Has since 1987 conducted a training programme taught at a distance leading to a diploma in distance education primarily for tutors. This is to be followed by a Master's degree programme aimed more at full-time professionals in distance education, and including training in course development writing.

6. Distance Education Branch, Ministry of Education, Sri Lanka

Has been responsible for in-service training of teachers at all levels. Its staff have been trained in a series of workshops since 1982 and have covered theory of distance education, guidance and counselling, tutoring, production and media, administration, research and evaluation. The training has been based on 4 Handbooks for:
- course writers
- tutors
- correspondence teachers
- production and administration staff

7. University Sains Malaysia, Penang, Malaysia

Has developed a comprehensive staff training programme which has included training for the off-campus programme. In addition, course writers have been sent for short-term attachments to Murdoch, Deakin or OLA.

8. University of the West Indies Distance Teaching Experiment (UWIDITE)

Has successfully established and trained a core of experienced staff for the efficient design and implementation of a fully operational system for distance teaching and outreach. It has produced expertise in print, audio and visual materials. Training manuals and handbooks include teleconferencing, audio and visual production and course development.

9. Unesco and the University of Birmingham

Have developed a modular training programme for staff in educational administration and management. The purpose of the programme is to provide a resource for trainers and specialists to use in developing more detailed curriculum for courses for various categories of educational personnel.

ISSUES FOR DISCUSSION ON THE TRAINING OF DISTANCE EDUCATORS

From the above information, it is apparent that there is a great deal of experience around the Commonwealth in the training of distance educators which could be shared more widely. It is therefore important that any discussion on training should address the issue of how best the relevant information on training can be shared. This information should include details of courses, training materials and resources available as well as their accessibility.

A significant issue concerns ways and means of ensuring that there will be meaningful and effective collaboration among institutions. There may, for instance, be certain conditions attached to the modification or use of training materials from some institutions and which need to be agreed upon by the parties concerned.
Since training is such a broad and complex topic, it might be prudent to adopt a selective strategy by focusing on two main issues. The first concerns the training of the trainer, and the second is the development of common course outlines which could be used for the training of distance educators in the three priority areas identified in this chapter.

It is most likely that the selective strategy suggested will, in time, yield a high multiplier effect and help to enhance and sustain the training of distance educators in Commonwealth countries. By making a thrust in training, COL will be addressing an important area of human resource development, while, at the same time, attending to other functions in its mandate that have to do with materials acquisition and development, strengthening institutional capacity and facilitating information exchange.

Lastly, a distance education system is not unlike an industry where a wide range of people with different abilities and responsibilities are involved, on a cooperative basis, in its operation. Indeed, distance education has been described as "an industrialized form of education". Perhaps there is something to be learnt here from the way an industry carries out the training of its staff.

**References**

CHAPTER 3

TRAINING IN DISTANCE EDUCATION: POLICY, PLANNING AND MANAGEMENT

Tom Prebble

Distance education is a relatively recent phenomenon. It has sprung up in response to the need for more flexible, cost-effective patterns for delivering education. Earlier practitioners of this form of education had few pointers to guide their efforts. They designed systems which seemed to address the tasks at hand, and then learnt to manage those systems by trial and error. As with any other field of complex endeavour we have been able to advance beyond this pragmatic trial and error stage. Some of the more thoughtful members of the distance education profession have helped us to conceptualise, analyse and evaluate our efforts. But distance education is not a pure science whose truths can be discovered by intensive research and reflection; it is a practical challenge which is open to any number of solutions. There is usually no 'right answer' in distance education and the field has no room for orthodoxies.

Our approach to the question of training should recognise and accept this pragmatic, contingent nature of distance education. To date most professionals involved in distance education have come to their work without specialist training in distance education. They are managers with various academic and business qualifications, teachers and lecturers with appropriate academic qualifications, course designers and editors with teaching and sometimes publishing experience, and audio visual technicians with a range of technical qualifications. Our efforts to identify training needs for distance education personnel and to suggest training solutions should recognise the ability of people to adapt old skills to new challenges, and should not attempt to over-train distance education personnel or to introduce an entirely unnecessary credential race.

MY OWN PERSPECTIVE

I bring perhaps three perspectives to my consideration of training.

Firstly, as Director of Extramural Studies I am responsible for the direction and management of the distance education programme at Massey University. Massey University is a large dual-mode institution where the extramural half of the teaching programme forms an integral part of the work of most academics. Teaching staff play a central role in all aspects of course preparation, teaching, administration and assessment. The involvement of central office staff in course development and editing is relatively modest, and the unit provides only those administrative and student support services which cannot be supplied by academic teaching departments. This experience gives me a perspective that is necessarily different from that of colleagues from single-mode institutions.

Secondly, I am currently President of the Distance Education Association of New Zealand, an association which links the four or five major national...
providers of distance education in New Zealand. Most of the other member institutions are single-mode providers, and through the co-operative efforts of the Association I have become very aware of the particular demands of this approach to distance education.

Thirdly, I came to my present position after 11 years as director of Massey University’s graduate programmes in educational administration. This experience has given me an awareness of some of the options facing a profession seeking to underpin its practical skills with explicit training and qualifications.

**STAFF TRAINING NEEDS**

My brief is to consider Policy-making, Planning and Management. These are such pervasive functions in distance education that at first I had trouble seeing them as focuses for distance training. Anyone employed at any level of managerial responsibility in a distance education institution should be aware of the main policy directions of the institution. Most people will have some contribution to make to the management of the programme and will need to know something about the system as a whole; and increasingly managers at all levels of educational institutions are making a contribution to the planning process.

This may suggest that there is a level of understanding which most senior and middle managers of distance education organisations should possess. They should understand the distinctive contribution and quality of distance education and the complementary role it plays with respect to conventional modes of education. This will include some understanding of teaching and learning at a distance. They will also need to understand how their own system works, and how each section contributes to the process as a whole. Finally, each manager must have a high level of skill and understanding concerning his or her own set of responsibilities.

Within each distance education institution there will be one or two individuals with overall responsibility for the programme. These people must have a working understanding of all the developmental, administrative, production and service functions carried out in support of the distance education programme. They will need to understand and master the decision-making systems of the institution and to influence the policy-making environment outside their unit or institution. They will need the skills and understanding to set goals and objectives and to design systems and programmes which will achieve these objectives. They will also need high-level management skills in order to co-ordinate the various functions into an efficient and effective organisation. Most importantly they will need to keep abreast of wider developments in the field of distance education to enable them to make appropriate choices with respect to programmes, media organisations and services.

There are then at least two sets of training needs in the area of policy-making, planning and management – the needs of middle managers to understand their specific roles and their contribution to the larger scheme, and the needs of senior management both to manage their existing systems and to plan for future developments.

In broad terms job training comes in two forms – programmes that are tailor-made for the individual role or organisation, and programmes that adopt a more generic approach, attempting to address the needs of people from a range of institutions and roles. Each mode has its strengths and its limitations. The former can be sharply targeted to an institution’s precise needs but may be expensive to organise and deliver and may lack continuity and direction. The latter will have the advantage of pooling training expertise and producing high
quality learning packages, but may not meet the precise needs of participants. The report of the Regional Seminar on the Training of Personnel for Distance Education conducted under the aegis of the Unesco Asian Programme for Education Innovation for Development (APEID) in 1983 suggested that policy-makers, planners, administrators and researchers constitute a group with similar training needs.

Table 3.1 reproduced from that report, lists a series of tasks and training needs, and these seem straightforward enough. But more simply, policy-makers and top level administrators have two broad training needs — firstly, they need to understand how the current system works and know enough about each of the major organisational elements to keep the whole system operating; and secondly, they need to be able to reflect critically on their institution's operations and options and modify the system and their behaviour accordingly. Most distance education administrators pick up the first set of skills on the job.

Administrative systems for student enrolment, programme management, financial management, materials production and regional support tend to be situation-specific, and there is no substitute for hands-on training. The more important ability, to reflect critically and systematically on how and why the system operates as it does, requires a more objective stance, a consideration of alternatives, and a forward-looking orientation. It is important that top administrators have the opportunity to find out how other distance education institutions operate and to discuss their experiences with colleagues in similar roles.

The APEID Workshop identified 12 separate patterns of training. The selection from among this list is likely to vary depending on the seniority and roles of the trainees. The training needs of middle managers may be addressed by a blend of in-house and externally-based training, and the following modes may be most useful:

1. Diploma and Degree Programmes in Distance Education
A number of distance education institutions offer diploma or degree programmes designed to provide pre- or in-service training for people working in various aspects of distance education. Some, such as the three- and four-month block course programmes offered by the International Extension College in London, have been offered on a full-time residential basis. Others, such as the Graduate Diploma in Distance Education offered by South Australia College of Advanced Education and the Diploma in Education (Distance Education) offered by Massey University, have been taught by distance education. The new Diploma and Masters degree in Distance Education offered by the University of London External Programme is another welcome initiative to make this sort of programme more widely available. These programmes deserve the continued support of sponsoring governments and employing institutions. They can make a particular contribution in training a core of administrative staff for a system newly embarking on distance education. However, such programmes are unlikely to offer a complete answer to the training needs of distance education institutions. Senior administrative staff are likely to find it difficult to maintain a programme of personal study by distance means and such people can seldom be released for long periods of full-time study. It will be necessary to devise more direct and supportive systems of training alongside such formal education programmes.
TABLE 3.1 Tasks and training needs of policy makers, planners, administrators and researchers.

<table>
<thead>
<tr>
<th>Personnel</th>
<th>Tasks</th>
<th>Training needs</th>
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<tbody>
<tr>
<td>1. Policy maker</td>
<td>1. Within the framework of national priorities, needs and constraints etc. conceives plans and guides in the execution of distance education programmes</td>
<td>1. Overview of distance education system, its strengths and weaknesses, its social need and economic viability</td>
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<tr>
<td>and planner</td>
<td>2. Overall manpower planning</td>
<td>2. Knowledge of developmental plans in other sectors so as to relate education to the overall development of the country</td>
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<td></td>
<td>4. Co-ordination and supervision of institutional programmes</td>
<td>5. Knowledge of distance education institutions working within the country as well as abroad and communicate with them</td>
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<td></td>
<td>5. Popularizing the distance education system</td>
<td>4. Student and tutor problems</td>
</tr>
<tr>
<td></td>
<td>6. Some other specific tasks related to services in the field as under:</td>
<td>5. Training in management and supervision of supporting staff</td>
</tr>
<tr>
<td></td>
<td>a) Appoints tutors, allocates students to tutors</td>
<td>6. Understanding of local conditions and problems</td>
</tr>
<tr>
<td></td>
<td>b) Deals with students and tutors problems</td>
<td>7. Skills in establishing rapport with community at grass roots level</td>
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<td></td>
<td>c) Responsible for efficient tutor functioning</td>
<td>8. Skills in human relationships</td>
</tr>
<tr>
<td></td>
<td>d) Arranges staff and equips study centres</td>
<td></td>
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<td></td>
<td>6. Schedules face to face sessions</td>
<td></td>
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<td></td>
<td>7. Arranges other uses of study centres</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8. Disseminates information to students</td>
<td></td>
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<tr>
<td></td>
<td>9. Supplies feedback to institutions</td>
<td></td>
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<tr>
<td></td>
<td>10. Collects marked assignments from tutors</td>
<td></td>
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<td></td>
<td>11. Sends samples for monitoring</td>
<td></td>
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<tr>
<td></td>
<td>12. Conducts examinations, sends results to institutions</td>
<td></td>
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<tr>
<td></td>
<td>13. Regional publicity</td>
<td></td>
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<tr>
<td></td>
<td>14. Helps in admissions</td>
<td></td>
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<tr>
<td></td>
<td>2. Analyses and interprets data</td>
<td>2. Orientation towards various educational research designs</td>
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<td></td>
<td>3. Makes recommendations based on research findings</td>
<td>3. Sampling techniques with reference to distance education</td>
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<tr>
<td></td>
<td>5. Disseminates research</td>
<td>5. Report writing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. Dissemination skills</td>
</tr>
</tbody>
</table>

(From APEID, *Training of Personnel for Distance Education*, Bangkok: Unesco, 1984, p. 28, Table 2)
2. Purpose-built Workshops

The APEID Seminar identified workshops as being of prime importance at this early stage in the development of distance education systems for many countries. Distance education systems, while varying in detail, present their administrators and planners with similar tasks and dilemmas. There would be real value in organizing national and regional workshops which could draw together management staff from a number of institutions to consider issues such as enrolment and student database management, materials preparation, materials production and delivery, regional services and alternative teaching media. Such workshops also serve an important function in bringing together distance education administrators from neighbouring institutions and neighboring countries. Current efforts to establish larger regional distance education programmes can only benefit from a better understanding among administrators about each others’ systems.

3. Professional Associations, Conferences and Seminars

In New Zealand we have a relatively small Distance Education Association (some 150 members). The Association hosts an annual three-day conference and two to three one-day regional seminars each year. Conferences and seminars tend to focus on practical issues, such as course design, use of communications media, regional support services, problems of distance learners. It could be a good use of COL resources and energy to encourage the formation of national but preferably regional distance education associations, and to use these associations as vehicles for staff training and mutual support.

4. Manuals and In-house Training

Distance education by its very nature tends to be a highly specialised but integrated process. Unlike conventional educational institutions which can afford to operate on quite 'loosely coupled' lines allowing a high level of individual autonomy, distance education institutions require clear role specifications and relatively tight coordination. People need to know what is required of them and how to perform their respective duties. Most distance education institutions find it both necessary and helpful to produce handbooks describing their various administrative and support services. These can usefully be supplemented with a programme of regular training seminars and in-house workshops targeted at particular groups within the organisation. A number of distance education institutions have prepared very comprehensive training manuals, and COL could assist newer institutions in gaining access to such models.

5. Professional Attachments

Very often there will only be one or two individuals performing a particular task within any distance education institution. The training needs for such individuals may be highly specific and not easily met through available training programmes. Very often what is required is the opportunity to visit an institution which has more experience with the particular technology or organisational process in question and to take a few days or even weeks to gain an understanding of the processes involved.

Institutional leaders may have many of the same training needs as their management staff, but may not always be able to take advantage of the same training. For instance, in-house training is not likely to be useful where the chief executive officer is already the most knowledgeable about the institution and its processes. For different reasons canvassed already comprehensive degree programmes may not appeal strongly to chief executive officers. Few will be able to afford the time to pursue a demanding course of part-time study, be it by distance or conventional means.
Some of the training modes appropriate to middle managers will have direct application for senior managers. Short attachments and professional associations are two modes that have obvious application. In addition there is a case for a series of training workshops offered on a regional basis and targeted at senior managers of distance education institutions and systems. COL could make a major contribution to organising and resourcing such an initiative. Intensive block courses such as those offered by the International Extension College, London, may also be an excellent introduction into the field for a newly appointed chief executive officer, registrar or chief editor of a distance education institution.

One further training mode is suggested at this point – an inter-visitations programme. Distance education institutions all address the same broad administrative and academic challenges, but they do so in such different ways. Policy-makers and administrators learn a great deal about their own systems simply by seeing and hearing how another institution addresses the same problems. Unfortunately, such visits are generally rushed and allow few opportunities for pursuing points of special interest. Such visits would be a more useful form of training if they were more structured and if participants had the opportunity to reflect on and discuss their experiences with colleagues. The New Zealand distance education institutions have considered this matter and prepared a proposal for a structured inter-visitations programme. Such programmes have some powerful advantages for participants. They can be tightly targeted to the needs of the visitors; they are intensive and therefore cost efficient; and they help forge bonds between distance educators around the Commonwealth.

So far I have been discussing the training of policy-makers and senior administrators. There is another important group of line managers on whom all distance education institutions rely to a critical extent. These are the second level managers in charge of functions such as materials preparation and production, enrolment, regional services and the like. These are the people who will need to have an intimate knowledge of how the system works in order to keep it running.

Such jobs make the usual demands on management skills such as staff and financial management, but they call for one skill of a very high order, that is, a thorough understanding of computer database management. Increasingly, distance education systems are relying on computer databases for all their basic administration and course management tasks. Whether the system is built on a mainframe computer with an integrated database management system or supported by free-standing personal computers running off commercial database applications, it is critical that there are personnel thoroughly conversant with programming as well as system management.

The training solutions will depend on the nature of the hardware/software mix and use. Institutions opting for integrated systems should insist on adequate staff training in the contract of sale and maintenance; home grown solutions using off the shelf software will need to direct time and resources to help staff become familiar with such packages.
SUMMARY

As a starting point, I would suggest the following types of training as warranting some priority in the attention of COL:

1. University level courses in distance education, preferably offered by distance education means, to allow policy-makers and distance education administrators to reflect on and become more familiar with the field of distance education.

2. Inter-visititation programmes which would allow groups of policy-makers and administrators to study a range of systems and options within the context of a carefully organised study programme.

3. Regional workshops on selected topics of policy and process in distance education, allowing neighbouring institutions and nations to learn from each others' practice as well as drawing on outside assistance.

4. The encouragement of national and regional professional organisations of distance educators, which can in turn promote training through the normal round of conference and seminar activities.

5. Guidance to distance education institutions in the provision of in-house training to personnel involved in distance education, especially academic staff responsible for course writing.

References

CHAPTER 4

INSTRUCTIONAL DESIGN
AND COURSE DEVELOPMENT:
A TRAINING PERSPECTIVE

B N Koul

INTRODUCTION

1. Instructional Design and
Course Development

Instructional design is essentially concerned with three areas:
- the issue of predisposition towards learning and teaching;
- the optimal design of instruction which includes the most effective arrange-
ment (sequence) of content for optimal learning; and
- the regulatory mechanisms in the processes of teaching and learning – pro-
gramme implementation.

A predisposition to learn is important at the level of individual and of society.
At an individual’s level, for learning to be effective, we need to consider the
level of study skills she or he has, and also the level required for instruction of a
certain type and level. At the societal level we need to consider what attitudes
people have towards intellectual activity of various types, and what is supposed
to be the best use of mind. Besides, learners’ personal, cultural and motivatio-
nal influences (on their desired instruction) need to be considered in order to
decide on whether these influences need to be treated at the activation, direc-
tional or maintenance level. Having identified the appropriate level, we must
make provision for effecting the corresponding appropriate treatment. For
example, if in a society or a section of it, personal or cultural biases provide no
motivation for potential learners to go in for instruction (of whatever type),
then the major feature of instructional design has to be a provision to activate
motivation, maybe by persuasion or by bringing home what the immediate and
long-term gains of such instruction might be. Similarly, where direction and
maintenance are needed, they have to be provided through instructional design.
In other words instructional design needs to be sensitive simultaneously to both
what uses a particular tradition assigns to mind, and what our awareness regarding
the changing situations suggests it should be. The suggestion is that
instructional design should not only be influenced by the predispositions of a
society at a given point of time, but also by what enlightened people within and
outside that society think they should be.

Optimal design refers to those modes of representation (or presentation)
which are simple and effective. Modes of representation depend on the subject
matter, the medium of communication, the learner type – age group, rural-
urban contrasts, for example – and what experiment and experience has taught
the instructional designer. Simplicity and effectiveness are functions of not only
the mode of representation, but also of the sequence in which the content is arranged.

It is common knowledge that there is no ultimate best sequence but there are principles which when applied yield reasonably effective sequences. An effective sequence is one that is generative in nature; it enables a learner to grasp the content, skill, or attitude under consideration, transform it into his/her learning set and then transfer it and use it in a variety of situations.

Lastly, design impinges on the implementation of the programmes, which includes the schemes for launching, regulating and closing programmes. Obviously such matters as admissions, student support services, and examinations are components of implementation. Here, the issues are those of two-way access (instrumental, geographical, cultural, pedagogic, andragogic and linguistic), and resources (technological, sociopolitical, human, material and financial).

A successful instructional design for a given situation (comprising a political set-up, geographical area, student populations, technology, educational needs, and resources) is one that, while taking into account all the factors discussed above, makes the transaction of education purposeful, effective and satisfying.

In the context of open distance education, instructional design comprises the following programme or course-related activities:

- Planning a programme/course
- Developing a programme/course
- Producing a programme/course
- Maintaining a programme/course
- Implementing a programme/course and
- Promoting a programme/course


The personnel involved in these activities are public opinion leaders, decision makers at the top level, curriculum experts, subject experts, course designers, teachers and media specialists.

Developing comprises activities pertaining to the basic research work needed for building a syllabus, needs and content analyses, syllabus design, course writing, preparation of media-briefs, academic notes and production scripts, preparation of supplementary materials and whatever other forms of material are needed.

The personnel involved are researchers, teachers, subject specialists, writers, editors, unit designers, script writers, media-experts, computer specialists, examiners, evaluation specialists, students, counsellors, tutors and assessors.

Production comprises activities pertaining to actual transformation of the manuscripts into usable printed materials, audio and video cassettes, radio and T.V. programmes, computer assisted learning/training packages, programme and study guides, instructional kits and any other materials in finished form.

The personnel involved are the copy editors, graphic artists, printers, binders, production managers, producers, audio and video production teams, computer specialists and other technicians.

Maintenance activities pertain to collecting planned and unplanned feedback on the quality and effectiveness of processes and products for incorporating corrections and modifications wherever necessary.

The personnel involved are academics, examiners, counsellors, students, evaluators and field workers.
Implementation comprises activities like making admissions, stocking materials, despatch of materials, activation of study centres, tutoring, counselling, assessment of assignments, monitoring the work of functional units and personnel all along the work-chain, holding examinations and awarding certificates, diplomas and degrees.

The personnel involved are those who man admission, despatch and evaluation units, warehouses, regional and study centres, tutors, counsellors, assessors, monitors, and examiners.

Promotion pertains to the dissemination of information, breaking the barriers to educational upliftment and orientation for socio-economically deprived sections of the population.

The personnel involved may be academics, counsellors, administrators, planners, social workers, media personnel and parents.

The personnel listed under each of the six activities above need training, some in generalised areas and some in specialised ones.

2. Generalised Versus Specialised Training

Experience suggests that the issue of generalised and specialised training in distance education needs to be looked at in three different ways – in terms of the content of training, clientele and training strategy.

Content criterion: In terms of the content of training, the issue needs to be considered from three different angles:

1. A complete distance educator has a high level of proficiency in the domains of information and skills coupled with appropriate attitudes pertaining to management of distance education, computer assisted learning, educational communication, instructional design, support services, programme evaluation, training and research. Accordingly these three domains should form the content of a complete training programme in distance education. This is the case of holistic content.

2. Depending on the specific areas of one’s interest in a process and a product, each aspect of distance education necessitates training that caters to specific needs. This is the case of componential content.

3. Against what we have indicated in (1) and (2) above, there is a relatively non-specialist content, mainly intended to make the non-specialists working for distance education aware of the system and about how they may contribute to its success. This brings us to the criterion of clientele.

Clientele criterion: Operationally the personnel involved in distance education get divided into two groups: first, those whose tasks are no different from what they would be if they were working elsewhere, such as typists, accountants, planners, engineers, desk officers; and second, those who come into the system to take up tasks new to them, those whose tasks are going to change from time to time, and those who are engaged in more than one such task at one and the same time.

The first group requires generalised training which should aim at making trainees aware of what distance education is all about. Training should cover its potential, the need for it, the special constraints it suffers from and the special considerations employees need to be sensitive to in their day to day work in order to make the system successful. The latter group, however, needs specialised training as it is this group that gets engaged in activities that are specific to the system of distance education.
Strategy criterion: Strategies are essentially functions of the resources and the period of time available for training. Some of the possibilities in terms of duration are given below:
1. short orientation programmes (1-2 days long)
2. workshop sessions (2-5-10 days long)
3. attachments with specialist departments, institutions or individuals (4-6 weeks long)
4. training programmes of medium duration (10-12 weeks long)
5. training programmes of long duration (40-52 weeks long)

In general, specialised training covering the domains of relevant information, skills and attitudes as compulsory inputs must require longer periods of time. On the other hand, generalised training can certainly be given in a short period of time, as it does not require long, whatever the case. In other words, generalised training fits better into short training programmes and may be managed with limited resources, while the specialised ones need larger resources and go better with longer periods of time. However, we need to note that specialised training also can be implemented successfully in a series of short specialist training programmes.

Having said this about generalised and specialised training, I prefer to look at them as the two ends of a continuum. It begins with elementary information and elements that build positive attitudes, proceeds through more and more skills-based specialisations, and leads on to abstractions which broaden the horizons of the system. In addition, with the passage of time the general-band goes on expanding as more and more of the special areas become general, and the specialist-band too advances as new technologies, experiment and experience give birth to new specialisations. Obviously, what may be termed special today, may better be called general tomorrow, or what is specialist in one country, may be general in another.

3. Rationale for Training

In the present educational scenario, we need to recognise that the distance mode of education promises to be the mode for the years to come and it demands a very high level of professionalism on the part of those who run the system. But the personnel who are employed in this new mode of education come from diverse conventional fields – academics from conventional universities, audio and video producers and technicians from the world of commercial media, planners and administrators from ministries and education departments and the like. All of them suffer from culturally induced biases. Their experience and work culture do not necessarily suit this new mode, nor their behavioural tendencies. One of my studies (Koul 1981) shows that the seemingly simple task of providing effective learning through the device of assignments, proves to be immensely difficult for the conventional teacher who looks at assignment-responses more as instruments of evaluation than those of effecting teaching and learning. The same study provided evidence that training in this area produces positive results. Trained distance teachers use assignments the way they should be used, and also take much less time to learn through training than they would take if left to learn the techniques by themselves.

So the case for training in the various aspects of distance education cannot be questioned. The pressure of demand is so immense and the time available to meet it so short that the system cannot be left to itself for its growth. It has to be developed on scientific lines, which implies a role of significance for training-
There is a need for scientific professionalism in distance education. It is common experience that when one thinks of an army, the existence of trained soldiers and hence the event of training is taken for granted. So is the case, for example, with an airline – you cannot conceive of one without training the pilots. In either of these cases we do not question the need for, nor the event of training. But when we think of the event of distance education, we find ourselves at pains to present a rationale for it. This, however, is not surprising, as even the institution of higher education in most parts of the world does not attach any importance to the training of teachers. A researcher is supposed to be an effective teacher as well. In all probability, this cultural bias is being handed down to the institution of distance education from its parent, education. The institution of education, through a process of slow growth over the centuries, has developed certain norms which guide its processes, and this state of affairs, though unsatisfactory from a professional point of view, remains the norm even today. But these norms are not applicable to the systems of open distance education as they mark significant departure from the conventional ones. New norms can be established and disseminated fast only through training and research.

STAFF TRAINING NEEDS

Training needs have been looked into and discussed at various forums (Unesco, 1987; IGNOU, 1987; Koul & Panda (eds), 1989), but most of these discussions are based on introspection. In 1989, we, at the Indira Gandhi National Open University, conducted a study, with the objective of identifying and developing strategies for meeting demonstrated needs for specific target groups involved in distance education (Koul & Murugan (eds), 1989). For pragmatic purposes, the target groups were arranged in categories of part-time staff and full-time staff. The needs of each group were identified empirically, as were the strategies to meet them.

As an illustration of the outcome of this study, I reproduce as Table 4.1 one of several tables contained in the report of the study.

The same study led us to the realisation that, in fact, we had not identified all the training needs, that there must be needs which have yet to be identified and some, already identified, yet to be met.

It is obvious that no two distance education institutions necessarily follow the same system, nor are they supported by the same level of technology. Obviously, their concerns for training are quite likely to differ. The implication is that to look for a generalised set of unmet needs may not be a search in the right direction. Given a particular need, it may have been met at one institution, and far from being even recognised at another, depending upon their respective levels of awareness. In other words, for a particular institution/country an unmet need is either one that has not yet been perceived or one that has been perceived but is not attended to. In this regard, it is interesting to note that the level of advancement reached by a country is not necessarily indicative of the clarity of its perceptions. For example, I am not aware of a full-fledged training programme available in Canada, though the tradition of distance education there is one of the oldest in the world.

Obviously, instead of talking about unmet needs, it may be advisable to talk of a continuum of needs, terminating in general ones at one end and specialised ones at the other. This continuum, I think, has one-to-one componental correspondence with the one visualised as the training continuum.
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<td>1. To explain the basic features of distance education.</td>
<td>Difference between distance education and other systems of education; philosophy of distance education and its implications.</td>
<td>A handbook on distance education sent along with the offer to the writers; lecture-cum-discussion and a general overview through a video.</td>
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<td>2. To identify the unique characteristics of distance learners.</td>
<td>Knowledge about target learners; knowledge about characteristic variations in and psychology of distance learners and adult learners.</td>
<td>A handout on adult psychology and adult learner.</td>
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<td>3. To describe the features of the IGNOU systems.</td>
<td>A brief history, organisational structure and academic activities of the IGNOU.</td>
<td>Copies of the IGNOU Act and brochures (the relevant ones) to be sent; face-to-face interaction.</td>
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<td>4. To explain the rationale behind a particular course structure.</td>
<td>Level of the target group – their previous knowledge and standards assumed; outline of the course.</td>
<td>A handout with relevant course outline (sent beforehand) and face-to-face interaction with the faculty.</td>
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<td>5. To explain what unit design is.</td>
<td>Principles of SIM (self instructional materials) and its pedagogic implications; features of SIM and functions thereof; variations in format; house-style of a particular programme; level and scope of content; how to present and incorporate the feedback in the unit and idea of concept mapping.</td>
<td>A prepared self-instructional unit (via explanation) to be sent; face-to-face explanation by DE expert (could be supplemented with a video) and each expert highlights the house style decided on for a particular course.</td>
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<td>6. To explain the role of simple language and conversational style.</td>
<td>Need for using simple words, active verbs, simple sentences and addressing the learner directly to relate the material to the effective domain of learning.</td>
<td>A workshop – produce a unit and get it evaluated.</td>
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<td>7. To prepare assignments.</td>
<td>Purpose, functions and types of assignments; academic communication &amp; evaluation; scope and number of assignments, frequency, etc.</td>
<td>Distance education experts talk about; the features of conversational style to be supplemented by subject experts. (Specific examples may be picked up from the material sent or the writer could be asked to pick up examples themselves.)</td>
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<td>8. To describe the assessment system.</td>
<td>Types of evaluation; purpose of various types of evaluation; grading – its advantages, issues involved, weightage, etc.</td>
<td>Studying and handling of sample assignments and discussion followed by a video on two-way communication – Subject-specific instructions to be given.</td>
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<td>9. To describe the role of multimedia package in the IGNOU.</td>
<td>Functions and limitations of various media and the choice of media in the context of a subject.</td>
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<td>10. To identify areas in need of audio and video programmes.</td>
<td>Notion of ‘brief’ and academic notes and how to write them; identification of areas which need audio and/or video programmes; duration of programmes.</td>
<td>A lecture on multi-media approach demonstrating the use of audio-video for various disciplines.</td>
</tr>
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<td>11. To write for practical/field based courses (School-specific).</td>
<td>Outlining and designing of practicals &amp; field trips and relating them to theoretical inputs; reporting on practicals and field trips and evolving methods of evaluating the practicals.</td>
<td>Samples of ‘brief’ &amp; academic notes; discussion with faculty experts; discussion with producers (hopefully with a grounding in the subject) who must be present throughout the session.</td>
</tr>
<tr>
<td>12. To adhere to work schedule.</td>
<td>Explain the importance of working according to schedules and outlining the schedule itself.</td>
<td>An outline of practicals should be sent beforehand to the writers; a one-day workshop. In the morning session, experiments innovatively designed for the IGNOU students and demonstrations may be discussed and in the afternoon session a lecture on how to write for practicals including discussion either to tabulate results may be organised.</td>
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</table>

Coming to the question how the training needs are being met, I would rather address myself to the question how they may be met. In doing so, I shall have touched upon the original question as well. By my reckoning the notion of training reached a stage of clarity during the last five years when three levels of training emerged and got defined clearly.

These are in-service training, pre-service training and training for trainers.

1. **In-Service Training: Stages, Sub-Categories and Content**

   Training of staff generally implies in-service training, which may have more than one stage – Initial or Round 1, Round 2, Round 3 and so on.

   Beside various stages, there will be various clients as well. The categories full-time staff and part-time staff are well recognised. Under these broad categories are the sub-categories of academic staff, non-academic staff and technical staff.

   The third variable involved here is the content of training which must correspond to each sub-category of the clientele and the stage of training. In each sub-category, the training at every round should reinforce the learning of and assess the applications made of what was learnt during the previous rounds and add what is intended in the operative round.

   The implication is that if distance education is to become more dynamic, and more responsive to research findings, changing technology and social situations, then training should become a regular feature of it. Of course, the frequency of the training rounds may differ from sub-category to sub-category. Strictly monitored in-service training could also be given credit value, and an adequate number of appropriately accumulated credits and whatever else is prescribed as theoretical or practical inputs put together could lead to certification. Such certificates, diplomas or degrees could also be made available by means of a regular course given through the distance or face-to-face modes.

2. **Pre-Service Training**

   Giving degree-based pre-service training has been questioned at times. The argument has been that the provision of pre-service training implies:

   - that distance education is a discipline by itself and needs to be promoted in its own right.
   - that there is an obvious and attractive market for diploma or degree holders; that is the society in general and the academic world in particular see distance education as a specialisation, value the specialist inputs and create positions for specialists to use their expertise purposefully.
   - that such a market is going to grow, diversify and sustain itself; and
   - that there are people who are convinced that a career in distance education is not only possible but worth accepting.

   It is often felt that these assumptions are not strong enough to warrant pre-service training at the moment. But, as we notice, the current trends are favourable, and as in management studies, if the distance educators themselves attach a high premium to training and professionalism in the practice of distance education, pre-service training will soon be given the importance it deserves. Such training is already available in Australia and India, and some other countries (Britain for example) are taking steps to introduce it.

3. **Training for Trainers**

   The need for training trainers points to a need for training the trainers of trainers. Obviously, it is an argument which pushes us into a difficult situation. My experience has convinced me that in a group of about 100 trainees, it is
only around 5% of them who display the qualities required of trainers. These 
qualities pertain to mastery over the relevant content and skills, an appropriate 
attitude towards trainees, a very high level of communication skills, and concern 
about the task at hand. To a great extent these qualities can be inculcated and 
developed through training, but there is no denying the fact that the person 
concerned should be able to recognise them in himself or herself and then also 
develop them. In other words, a trainer, to a great extent is a self-creator. The 
master-trainer who trains him or her differs from the trainee in confidence, 
experience, and the level of communication skills, but not necessarily in his or 
her concerns. Thus, one of the tasks of the master-trainer is to identify the 
potential trainer, and then train him or her in higher level communication skills 
and self-generative techniques. In the last analysis, it is these techniques and the 
level of concern that make a trainer. From this point of view a trainer may 
emerge at any of the training rounds we have talked about. Having emerged 
and been identified, she or he would need to undergo the courses suggested 
elsewhere in this paper. Besides, she or he needs to continue as a practitioner in 
least one area of specialisation, for example, self-instructional course design, 
media materials, computer assisted learning or student support services. 
Whatever the level of training, it involves seven factors:
1. a need for training
2. social recognition of and the will to meet that need
3. a well identified area of training
4. availability of materials and relevant equipment to effect it
5. availability of trainees
6. availability of trainers and
7. adequate infrastructure and scope for using the services of those trained

For organised institutional training to come into existence, factors 4, 5 and 6 
constitute the minimum prerequisites; for such training to have educational and 
socio-economic purpose and impact, the remaining factors are equally significant; and for it to have long-term and future relevance, research should accom-
pany all these factors as a guiding factor.

CONSTRAINTS AND PROBLEMS

In the last section we listed variables which are basic to the transaction of 
training. Difficulties with regard to these variables may be called constraints if 
they fall outside the actual process of training and those within it may be called 
problems. These are taken up for discussion in that very order as follows:

Common Constraints
1. lack of awareness about the importance of or need for training at most levels 
of management and work force
2. lack of political and administrative will to effect training
3. lack of adequate finances for the purpose
4. lack of an identified area or an aggregate of diverse areas which may consti-
tute the content of training
5. lack of materials (hardware and software) needed for imparting training
6. lack of trainers
7. lack of supporting research which is so essential to make ‘training’ activities 
relevant not only for the contemporary situation but also improve them pro-
gressively to meet the ever changing challenges
8. lack of infrastructure to put training to its appropriate use once it is given.
The first three constraints operate essentially at the top level of management and also in the collective psyche of conventional academics who constitute the basic human material for the distance education enterprise. Experience has shown that, though favourable political will has given rise recently to a number of open distance education institutions all over the world, the need for training has not been seen as a priority activity in most of them. This is partly because the role of training is lost sight of; and partly because, in the first flush of enthusiasm, institutions are inclined to prefer activities which promise visibility and glamour rather than those which are patently utilitarian and characteristically inconspicuous. Besides, by convention, higher education has attached little importance to training in the actual transaction of education – teaching and learning. And distance education follows suit.

The availability or otherwise of funds for training is a consequence partly of the same political and administrative indifference (born of limited awareness) and partly of the same convention being transferred to distance education.

Now, if somehow the top management awaken to the need for training, they immediately find themselves faced with constraints at the operational level – the second set of three constraints. First of all because of the newness of the enterprise they do not know exactly in what areas training needs to be provided. Secondly, if they somehow identify the areas, they soon realise that there are hardly any materials that cover those areas. And if materials are made available, it is realised before long that there are no trainers whose services could be put to use at will.

An academic, who has spent years in teaching and researching at a conventional university, not only thinks but is convinced that he or she has no need for any training when he or she joins an open distance education institution. What is anybody going to train her in? Who is it that will train him? These are some of his or her misgivings. Constraints in the form of such attitudes make it difficult not only to identify the areas in which training may be required, but also to impart it. As a consequence trainers too are in short supply, as those who do not accept distance education as a discipline do not see any sense in pre-service training in this field. In fact most trainers today the world over have either transferred their interest and expertise from a well defined area of training to distance education, or are self-taught trainers who got into training more by virtue of circumstances than by decision.

The third set of constraints 7 and 8 is experienced more intensely if others have been overcome. That is, once a training programme is made available, its growth is constrained by the near non-availability of research that could support and improve it. I am aware of unfortunate situations where research is available, the findings and valid suggestions based on them are also available, but the institution concerned does not pay attention to them. In other words, even the research, that is available, is made non-available by a retrograde attitude towards it. Even more distressing is the situation where a trained person cannot utilise her or his training. This is not a hypothetical situation. It is quite normal, for example, in India, that an academic, who has gone through training in the area of assessment or commenting on assignment responses, finds himself in an institution that does not use assignments as a pedagogic device in their distance education programmes. Needless to say, such situations are as demoralizing for the trained person as they are harmful for the institution of training itself.
Common Problems

Having touched upon constraints, we now turn to problems, the difficulties that arise within the event of training itself.

Non-availability of trainees: Failure to see the purpose of such training, lack of adequate funds to undergo training in cases where the purpose is clear, and simple resistance to the idea of undergoing training all handicap training programmes considerably.

A different reason for the non-availability of trainees is that they have no time to attend training programmes, as most of them are doing their jobs and normally they cannot be released for training.

Different levels of concern among the trainees: As no two trainees display the same level of concern for the new task they have taken up, rigid content does not prove as effective as one thinks. A way out, as Meacham (1981) would have it, is to identify trainees' "levels of concern", and then look for what is suitable for them before they are made to undergo training. Such an approach should, in all probability, resolve the problem of resistance as well, at least to some extent.

Non-availability of proficient trainers: Trainers' own concerns also cause problems. A highly self-centred trainer finds it very difficult to let the trainees take off. Very often, she or he implants the weakness of dependence among the trainees who, then, find it difficult to work on their own and remain looking for the trainers' approval for whatever they do. The implication is that it is very difficult to find good trainers, a fact that is not easily recognised, much less worked on.

Difficulties in international cooperation: In the context of international cooperation in training, cultural and linguistic differences create problems of communication, more so if the trainer is from a technologically advanced country and the trainees from a developing one. In such cases, the trainer needs to be sensitive to the situation, and have flexibility as one of the tools of his or her repertoire, so that the trainees are neither put off nor overwhelmed to the extent of becoming unresponsive to training.

RECOMMENDATIONS AND SUGGESTIONS

Starting with a discussion about training strategy, this section reflects on the scope of cooperation and closes with a few practical suggestions.

Strategies

A pragmatic strategy for training staff for distance education is to cater for the needs of aspirants at the three levels discussed earlier.

In-service full-time staff must be trained through *serialised workshop sessions* supported by printed and media materials and rounded off with appropriate evaluation. The part-time staff, on the other hand, may be catered for by means of *well monitored orientation programmes* repeated whenever necessary.

Pre-service training is best given through institutionalised certificate, diploma and degree programmes. These should be available through the distance mode, in face-to-face situations and also by a combination of the two modes.

Training for trainers needs additional components over and above the components that make a diploma or a degree programme. These components could be offered as a single package or as separate courses by institutions which are offering diploma or degree programmes following the system suggested for pre-service training.
It is desirable that there be a reasonable degree of uniformity among the inputs offered by various institutes at all the three levels suggested above. To achieve this objective a schedule of equivalences needs to be prepared and agreed upon by the institutions and countries which are involved in training. A scheme to this effect is suggested in Box 4.1.

**BOX 4.1 A scheme for training**

Yearly input in terms of student hours can be taken as about 900 student hours, 30 credits at 1 credit equals 30 student hours. Successful completion of around 15 credits pertaining to any one or more specific areas of distance education should earn a person a certificate. Any purposeful combination of two certificates should earn one a diploma and any rational combination of two diplomas a degree. The areas mentioned above could be, for example,

- Growth and Philosophy of Distance Education
- Student Support Services
- Planning & Management of Distance Education
- Preparation of Self Instructional Materials
- Curriculum Development in Distance Education
- Media in Distance Education
- Economics of Distance Education
- Research in/for Distance Education
- Nonformal and Continuing Education by Distance Mode
- Special Education by Distance Mode
- Pedagogic Communication Skills
- Human Behaviour and Training Techniques for trainers

Thus, if we offer small packages of about 6-8 credits each on various areas, one could claim a certificate on successfully completing two of these packages and so on. Such courses could be given in face-to-face situations, through the distance mode or using the two modes together.

Corresponding to each of these packages we need to have pro-packages which can be used by trainers in orientation and workshop sessions. IGNOU Handbooks 1-7, for example, could serve this purpose. These Handbooks cover themes like academic counselling, assessment of assignment responses, and self instructional course units. Pro-packages of 10-12 hours could be used in orientation programmes and those of 50-60 hours in workshop sessions.

The scheme suggests a way of effecting in-service, pre-service and trainers' training in a variety of ways; it also makes room for inputs from different institutions, at differing times for differing purposes.

**Cooperation among Commonwealth Countries**

At the moment, cooperation among Commonwealth Institutions and countries in the area of training in distance education is limited, and is mostly bilateral in nature. Mostly it is the advanced countries that provide inputs to developing countries, while developing countries do not find ways and means to assist each other, let alone the situation in which developed countries may be seen taking inputs from developing countries. Then, there are situations in which cooperation verges on stark commercialism in which competition and protectionism are the norms of exchange. In such situations the receiver countries and institutions get pushed into non-generative activities which yield
greater advantages for the helper countries than the receiver ones. Still worse are situations in which receiver countries suffer disadvantages in terms of the crippling effects of the juxtaposition of the mismatched perceptions and needed solutions of problems. This is not to deny the fact that there are many cases of cooperation which have yielded immense advantages for the parties concerned. But, by and large, cooperation in the field of training is still a far cry.

The purpose of highlighting the above points is to suggest that the scope for closer cooperation lies clearly in creating an atmosphere for and also the means of setting right the undesirable trends of the kind illustrated above. To me setting these trends right amounts to closer cooperation, and the scope for setting these trends right is immense indeed, and so of making cooperation closer too. The obvious areas of cooperation include exchange of experts and trainers, exchange of materials, joint production and joint running of training programmes and attachments.

What COL Should Do

Some practical suggestions follow for achieving what is proposed above. These suggestions can be linked with the constraints and problems outlined previously.

1. Since we are concerned with Commonwealth countries, the identified clientele groups for training get divided into three broad categories:
   a) Advanced countries with a high level of technology, high rate of literacy, high level of student-awareness and high level of two-way access to technology.
   b) Developing countries in which technology is available but not self-generative; besides, student-awareness, and access to technology are limited and the rate of literacy is low.
   c) Developing countries which are very low on all the parameters mentioned above.

   Training needs of these countries differ considerably, and models developed in (a) may not resolve the problems of (c). We need to keep this in mind in any discussion about their training needs and the means and ways of training them, as also the way distance education may be effected in them.

2. Identify and collect (with their price tags) whatever materials for training purposes (print, audio, etc) have been produced or are available in the Commonwealth.

3. Assess and tabulate their strengths and weaknesses in terms of their academic content, level of instruction, extent of coverage, media mix, nature of support services needed, the accompanying evaluation systems, structural flexibility for differential and optimal utilization, cost per package, cost per student and conditions/possibilities for using them in a country other than that of their origin.

4. Identify and tabulate the needs of the receiving countries, the category they belong to (see a above), their capacities of absorption, levels of awareness, economies, socio-cultural profiles, demographics, politico-educational profiles and geographical features.

5. Using the information available under items 2, 3 and 4 above, help the receiving countries to identify and rank the packages that suit them most, and then facilitate negotiations between them and the helper country/countries to effect the needed training.

6. The activities suggested in items 2 and 4 above should help in identifying suitable trainers, whose specialist training as trainers should be supported and
used by the receiving country, the helper country and COL wherever possible. It is likely that receiving and helper countries and also other funding agencies will come forward to help COL to implement such a plan.

7. Using the information available under items 2 and 3, together with additional relevant information in terms of the institutional credentials, COL should prepare credit equivalence schedules and formulas, which can be used across institutions for granting suitable recognition to their certificates, diplomas or degrees, institution specific specialisations and components thereof.

8. COL should provide human resources to help Commonwealth countries and institutions to prepare project proposals for introducing, promoting and sustaining distance education programmes.

9. COL should introduce a journal which presents abstracts of relevant documents and research universally (at least in the Commonwealth Countries) on the basis of continued subscriptions from Commonwealth institutions. It will facilitate contacts and coordination also.

10. Since what has been suggested above is not a one time job, COL should establish an academic unit with a core staff of two to four specialists in distance education (instructional design, media, support services etc) who will be responsible for carrying out the tasks and responsibilities listed above and others as experience and needs unfold them.

If such a unit is actually established, it will be possible for COL not only to assimilate and then disseminate global research and expertise on distance education, but also to take on the roles of academic coordination and leadership more creditably. Then it will have not only its own sources of information, but also the means of dissemination; for example, it could then provide training for trainers through its own human resources.

11. COL should establish an industrial unit that can generate funds throughout the year to support the academic unit proposed above – seemingly a wild suggestion, but it is the experience of the Regional Language Centre (RELC), Singapore, that motivates it. I think it is worth consideration.

References


Koul, B N and S K Panda, eds, Development of Training Packages in Distance Education, Bangkok, Unesco, and New Delhi, IGNOU, 1989.


CHAPTER 5
APPLICATION OF NEW TECHNOLOGIES
(INCLUDING COMPUTERS)
IN DISTANCE EDUCATION:
IMPLICATIONS FOR THE TRAINING
OF DISTANCE EDUCATORS
A W Bates

RATIONALE

Probably no other area of distance education is developing more rapidly than the application of technology to both teaching and administration. While most distance education still remains primarily print based, more and more institutions are moving to the use of electronic technologies, and even print-based distance learning is being dramatically changed by the application of electronic publishing techniques.

Perhaps more importantly, new technologies provide opportunities for developing new models of course design and administration. This in turn has major implications for funding, the organisational structures of distance teaching institutions, student support services, and above all training.

The Rapid Expansion of Technologies for Distance Education

There is a very strong need for training in the application of technology to distance education. Tremendous pressure in the past has been put on developing countries by aid agencies and hardware manufacturers to invest in technology-based education projects, but the history of education, particularly in developing countries, is littered with the corpses of technology-based projects that were killed off because of the high operating costs, problems of adaptation to local conditions, lack of skilled personnel to operate the technologies, and lack of effectiveness. These lessons need to be understood before any organisation rushes in to use new technology.

At the same time, there has been a rapid expansion in the range and types of technologies available to distance educators. The more traditional technologies of broadcast television, radio, and audio-cassettes are not fully exploited, or have often been badly used in distance education. In addition to these older technologies and older type print production, though, the following new technologies are now increasingly available to distance educators:

- electronic publishing
- telephone teaching and audio conferencing
- audio-graphics
- video-cassettes
- satellite and cable TV
- computer-assisted learning
- electronic mail and computer conferencing
- video conferencing
- video-discs and CD-ROM

Each one of these technologies has already been applied to distance teaching somewhere or other, and some of these technologies are already becoming firmly established in some institutions. In many other cases, such technologies will be totally inappropriate, given local conditions, particularly in developing countries. Training is therefore required even in a negative sense, to be able to resist demands for the application of inappropriate technologies in a particular distance education context.

Reasons for Increased Use of Technology in Distance Education

Nevertheless, there are several reasons why technology is likely to play an increasingly important and legitimate part in distance education, even – or especially – in developing countries:
- it can lead to reduced costs of course production and delivery, especially for courses with small numbers of students (less than 200 per annum)
- it can reduce costs of administration
- the move towards more decentralised, localised student support and course delivery, via learning centres
- a large-scale increase in work-based training
- a move away, for educational reasons, from ‘traditional’ distance education courses, with high front-end costs and long development times, to more ‘on-line’ and easily up-dated course design and delivery

Training Implications

'Real-time' distance teaching, through inter-active live or video-recorded television broadcasts, and/or computer-conferencing, combined with set reading from text books and journal articles, can dramatically reduce the high 'front-end' costs of specially designed print-based courses, for courses with small student numbers, and can also increase student interaction and allow for flexibility in up-dating course material. Electronic publishing can dramatically reduce the cost of more traditional print-based courses, by reducing labour costs. In both cases, though, not only do existing staff have to be re-trained and in some cases new staff and facilities brought in, but to obtain such savings, major re-organisation of departments and changes to job specifications are also needed.

There is also a growing recognition of the importance of adequate local or inter-personal student support, in terms of direct contact with both 'human' counsellors and tutors, and with other students. This is leading to even greater importance being placed on local study or learning centres. Once these are established, the question arises as to what equipment, if any, should be placed in such centres. This in turn requires quite difficult policy decisions about the relative importance of course delivery through local centres or at home, and the extent to which students should be obliged to attend local centres. There are also major cost and security implications in placing equipment in local centres.

Lastly, the major growth area in terms of target groups for distance education over the next 10 years is likely to be in the field of vocational training, and particularly work-based training. Often this will require training of workers in the use of the very technologies which can be used for delivering distance training, and especially computers. This means that in many cases, the technology will already be available where the worker training is to take place.
For all these reasons, training in the application of new technologies in distance education is essential. Furthermore, this training is required not only by those in the 'front-line' of technology applications (i.e. instructional designers, production staff) but also by senior managers and teachers, because of the need for clear policy regarding teaching approaches, organisational structures and financial control.

STAFF TRAINING NEEDS

This rather crude division between 'front-line' designers and production staff, teaching staff, and management will be used to identify different training needs.

The Importance of Context (or Local Conditions) for Decision-Making

In deciding on appropriate technological applications in distance education, context is all-important. Obviously, a very large and high-budget organisation such as the British Open University will be able to make very different decisions compared with a small extension unit in a poor, developing country. Even between developing countries with similar levels of economic development, decisions will differ according to geography, local technological infrastructures (e.g. availability of broadcast services), and educational structures. Lastly, even within a single institution, different decisions will be required between different areas of distance teaching, dependent on the needs of the target group and the teaching requirements of a course.

Furthermore, in educational and cost terms, there is no 'super-technology'; different technologies have different strengths and weaknesses. This means then that a combination of technologies is usually the most appropriate decision, although the balance will vary from context to context.

There are also two quite different levels of decision-making. The first is the decision to set up a system of distance education based on certain technologies. This will involve heavy capital investment. The second level is how best to use such technologies once they are available. This means that general statements, like 'video-cassettes are better than satellite TV', are not helpful; it will all depend on the circumstance.

Choice of Media: the Need for a Strategic Approach

Perhaps the most important—and most difficult—training need in this area is the need for a set of procedures, or a check list of questions that need to be answered, irrespective of the type of institution or distance teaching programme, to enable appropriate decisions to be made regarding the choice and application of different technologies. Furthermore, the criteria for choice must be understood and applied by staff in each of the three categories defined.

The major problem here is the lack of generally agreed criteria for media selection in distance education, or even more fundamentally, a lack of appropriate theory or procedures. While there are numerous academic books on media selection in education, they do not in general suggest approaches that are either practical or relevant to distance education. Consequently, crucial decisions, both at a system level, and in terms of particular applications within a course, are made primarily for commercial, administrative or political reasons: the availability of a broadcast service; the offer of free or cheap equipment; the familiarity of academics with print as an instructional medium; the enthusiasm of a key
decision-maker for a particular technology; the appointment of people with skills in a particular area, such as computer-assisted learning or video production, and the need to maximise their services. In particular, once facilities and staff are in place, it is very difficult to change. When new technology is introduced, it tends to be added on to existing media, rather than to replace more costly or less effective media.

While this is the reality of media selection in distance education, lessons have been learned. There are several different factors to take into account, which cannot be related to one another quantitatively. Thus in the end, an intuitive decision has to be made, but based on a careful analysis of the situation. Although there is no generally agreed set of procedures, I have suggested that decision-makers should use the acronym:

**ACTIONS**

...as a guideline for decision-making:

- **A**ccess: where will students learn; home, work, local centres?
- **C**osts: capital and recurrent; fixed and variable
- **T**eaching functions: presentational requirements of the subject; required teaching and learning approaches
- **I**nteraction and user-friendliness: do students and teachers require a great deal of training to use this technology
- **O**rganisation: what changes in organisation will be required to facilitate the use of a particular technology?
- **N**ovelty: to what extent will the ‘trendiness’ of this technology stimulate funding and innovation?
- **S**peed: how quickly and easily can material be up-dated and changed?
  - How quickly can new courses be produced using this technology?

(For more details of this, see Bates, 1989)

**Awareness of the Potential and Limitations of Different Media**

In terms of using different media, it is important to distinguish between the failure to exploit fully already existing media, and the need to increase awareness of new technologies. In both cases, there is a need not only to develop critical frameworks for analysis along the lines indicated above, but to give people practical hands-on experience or ‘prototype’ examples of how technologies can be used.

For instance, in my own institution, we are about to embark on a series of 12 two-hour seminars on technology in distance education. In these seminars, we will make use not only of internal staff, but also of staff from local universities and appropriate visiting specialists. The first hour will be primarily a mixture of demonstration and analysis of a particular technology; the second hour will be mainly a discussion of the practical limitations and obstacles to using such technologies in our own institution. We are deliberately attempting to keep together the same group of approximately 30 people for all the seminars, and this group is drawn so as to include a wide range of people from both the institution and its partners (instructional designers, academics, course co-ordinators, graphic designers and editors, the librarian, student support services, the computer department, TV producers and programme co-ordinators). The aim is to develop a set of recommendations regarding:

a. particular technologies which we ought to be using over the next five to ten years
b. core teaching models for future courses, i.e. the main ways we wish to design and deliver courses over the next five to ten years

c. the necessary technological infrastructure to support the above

d. the necessary organisational infrastructure to support the above.

In addition, we are hoping to develop some in-house training materials from these workshops, using examples, previously published papers and books, and specially prepared notes, to be studied in an open learning format by staff who were unable to attend the workshops. Also, for those technologies identified as core areas, further workshops will be organised.

PROBLEMS AND CONSTRAINTS

Some problems, such as the lack of agreed theories or procedures for media selection, and lack of trainers in this area, have already been mentioned.

The major difficulty though regarding technology in distance education is to do with the rapid developments that are taking place. This means that training needs to be continuous, over an extended period, and will need continuous revision. Also, it is difficult to train in this area without practical demonstrations. This may mean obtaining specialised equipment, such as computers or audio-graphics equipment, before commitments to establishing such systems have been made.

In some areas, there are well-established training programmes and opportunities, such as in broadcasting. With few exceptions (eg the BBC/EDTV training course*), such training is primarily technical, and does not address the key issues of distance education, such as costs, limitations of the media, etc. In all cases, such training is costly to provide, requiring travel and relatively long stays in a foreign country.

Lastly, there is a lack of recent good publications appropriate to training in the application of technology in distance education, particularly for developing countries. Many of the existing publications are case studies (such as a number of World Bank publications). Not only is it difficult to generalise from these, they are often cases where technology has been applied to on-campus teaching or schools (eg educational television or radio projects). There is some literature available on some of the more recent distance education applications, but this tends to be scattered in journals or consists of internal documents, and is not always easily available. There is a good general introduction to non-print instructional media in the IGNOU course on Distance Education, but it does not go into enough detail for specialised training, particularly regarding more recent technological developments. There is a recent publication on media and technology in European distance education which gives a good overview of what is being done in Europe at the moment (Bates, ed, 1990), but it is not in an appropriate form for training, other than as a reader. An important step would be the development of an appropriate bibliography on this subject.

Probably the most important constraint though is the failure within most distance teaching institutions to recognise the importance of providing training generally, and particularly training in the application of new technology. There is a good deal of hostility in many institutions to the use of technology. While there are often good reasons for this, sometimes the hostility is a result of fear or ignorance. Unless there is a strong management commitment to training in this area, (and hence a strong belief in the ultimate value of using technology,) it will not happen.

* British Broadcasting Corporation Educational Television
RECOMMENDATIONS AND SUGGESTIONS

Training, while necessary, is expensive. Not only are there the direct costs of preparing curricula and materials, there is also the more major cost of the time of staff away from course design, production, delivery or administrative activities.

It is my view that what is needed is the development of a high quality 'core' of training materials on the application of technology to distance education, prepared largely as self-instructional materials, but in such a format, and with appropriate back-up materials, that the materials can be adapted for local use, and for group work locally. Because of the scarcity of good trainers in this area, and the rapidly changing nature of the subject area, it is probably the only way that high-quality training can be provided on an extensive basis.

I would see then a set of textual materials, supported by audio, video and computer examples, designed for self-instruction, but with the capacity for updating through the use of audio-conferencing and possibly E-mail and computer conferencing. As well as specially written materials, the textual materials would include a 'reader' of selected examples, and possibly one or two existing books. The material could form part of a Diploma or Masters course, and would probably require approximately 30 weeks part-time study (400 hours).

However, for such materials to be developed, a proper 'course proposal' is required, covering likely users, curriculum topics, teaching methods, a production schedule, methods of delivery, maintenance requirements, and a budget. This in itself requires a good deal of effort. Funding therefore needs to be found for this initial activity. If such a proposal was acceptable to a number of institutions (perhaps through a commitment to purchase materials and to assist with the design and delivery of such a course), a production team would need to be assembled, and advance funding found.

There is an obvious role here for the Commonwealth of Learning, as a broker and as a catalyst for raising funds. The course proposal could build on already existing contacts developed between IGNOU, Deakin University, the International Extension College, and the Open Learning Agency, although other partners should be welcomed.

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Bates, A W, ed, Media and Technology in European Distance Education. Heerlen EADTU, 1990.
CHAPTER 6

THE ADOPTION AND ADAPTATION
OF EXTERNALLY-PRODUCED
COURSE MATERIALS:
TRAINING IMPLICATIONS

G Dhanarajan

The growth of distance learning at all levels of education and in diverse geographical locations is well documented. Accompanying this growth is a recognition of extreme shortages of technical and professional staff who are able to plan, install, operate and manage a radically different system of education. In open learning systems, staff must be trained to cope with:

- ‘institutional teaching’ rather than ‘teacher teaching’;
- instruction for independent learning;
- depersonalisation of the teaching process; and
- technical and systematic planning and development of learning materials.

The validity of professional training for those who face this new situation is not questioned as it once was. In the last decade there have been numerous workshops, seminars, conferences and feasibility studies to define the needs, scope and methodologies of training distance education practitioners. These activities have in turn given rise to a few training programmes at the institutional, regional and international level. The impact of these initiatives is yet to be determined: that we are still seeking a generic training model is indicative of the situation.

The training needs described in this paper are based on the relatively short experience of the Open Learning Institute of Hong Kong (OLI). The Institute is still attempting to define the parameters of its staff training programme. The OLI’s operation is not entirely similar to other dedicated distance education establishments and, accordingly, its staff training needs are marginally different. Therefore, a substantial portion of the views expressed in the paper should be seen as indicative for meeting training needs rather than prescriptive.

THE OPEN LEARNING INSTITUTE OF HONG KONG (THE MODEL)

The Open Learning Institute of Hong Kong was established in June, 1989, to offer courses at sub-degree, first degree and higher degree levels. Enrolment in April 1990, at the beginning of the second semester and barely ten months after the establishment of the OLI, stood at 9,800. This approximates 3,500 full-time equivalent course registrations. The almost 10,000 learners are

The author wishes to acknowledge the help provided by Shanon Timmers, Senior Course Deisgner, OLI, in the preparation of this paper.
enrolled in thirteen courses. Note that a course is defined as 5, 10 or 20 credits of study in a first degree programme of 120 credits or an honours degree of 140 credits. Enrolments and the number of courses offered by the Institute are expected to double in 1990/91 and double again in 1991/92. By 1994, the Institute will have approximately 30,000 course registrations spread over 135 individual courses leading to at least sixteen different undergraduate qualifications. Most of the OLI’s courses are multi-media in nature. They employ print, audio (both cassette and broadcast), and video (both cassette and broadcast). The Institute is already exploring the use of audio and video teleconferencing, an electronic mail system and cable TV, all for the purpose of delivering instruction to learners. The academic management of the courses is the responsibility of about 45 full-time academic staff and 1,000 part-time tutors organised into three schools in the academic division. Supporting the teaching/learning activities are the administrative and resource divisions of the Institute. Figure 6.1 illustrates the divisions of the Institute and their respective functions.

FIGURE 6.1 Organisation and responsibilities at the Open Learning Institute of Hong Kong

![Organisation and responsibilities diagram]

**Academic Division**
- Programme planning
- Course development
- Academic standards
- Academic research
- Institutional relations
- Academic counselling
- Supervise academic staff
- Training and development
- Computer centre
- Educational technology centre
- Learning resource centre
- Library
- Centralised laboratories

**Resource Division**
- Finance
- Accommodation
- Marketing
- Fees
- Management information system
- Negotiate contracts

**Administration Division**
- Personnel services
- Learner registration
- Student affairs
- Supplies
- Examinations
- Publishing
- Warehousing
- Course delivery
- Secretary to Council

The OLI of Hong Kong is different from other distance teaching institutes in the following features:
- most of its courses are imported from external sources;
- it is compact in scale and exploits in its own environment the teaching resources of other organisations;
local course development is contracted for rather than undertaken by full-
time staff;
• it attempts to work as part of a consortium of Hong Kong's higher educa-
tion providers; and
• there is little formal contact between learners and the full-time employees of
the Institute.

The OLI is similar to other distance teaching institutions in the following
features:
• it operates a dedicated distance education programme;
• it teaches through multi-media, self-instructional material;
• it has an open entry system; and
• its instruction allows learners to pace their studies.

Figure 6.2 illustrates the main components of the OLI's teaching and learn-
ing activities. It suggests the different roles of the staff of the OLI and other
distance teaching institutes in at least three areas which play an important part
in the teaching and learning system. These are: 1) planning of programmes and
courses and their acquisition; 2) programme and course development, delivery
and evaluation; and 3) course production. The rest of this paper confines itself
to these three areas. This does not mean that training is not needed in the other
areas of the OLI of Hong Kong or in similar institutions. It simply means the
differences encountered in these other sections (such as Registry, Warehouse
and Resources Division) are not within the scope of this paper.

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**Figure 6.2** The teaching and learning system of the Open Learning Institute of Hong Kong
(adapted from Clarke and Costello et al., 1984)
THE ROLE OF CURRICULUM, PROGRAMME AND COURSE PLANNERS

The OLI of Hong Kong was deliberately set up as a very compact operation. Curriculum design, and programme and course planning, have been undertaken not only by senior academic managers and invited external peers, but also by the individuals who ultimately have the responsibility to adapt course materials for local use and coordinate the delivery of courses. At the OLI, planners are expected to determine:

- the educational purpose of programmes and their constituent courses;
- the nature of learning activities in courses;
- the organisation of learning activities for effective instruction; and
- methods for evaluating the learning experience.

In determining the types of learning activities that local learners need, academic staff at the OLI require the same skills as similarly placed individuals in other systems. Because the OLI relies on externally-produced course materials, however, staff also must exhibit great sensitivity for local learners' needs and abilities, their learning environment, programme and course relevance, and the cost and transportability of courses. In addition to addressing cross-cultural and inter-institutional problems, OLI staff must also address the following aspects of externally produced material:

- cost of acquisition;
- technical and production quality;
- backup and supplementary material;
- integration of the various components of an imported course;
- implications for adapting the material for local use and for revision;
- structure, language and readability, clarity, and motivational aspects of the content; and
- rigour and complexity of summative and formative assessment demanded by course content.

The tasks and training needs of programme and curriculum designers are shown in Table 6.1. Some of their training needs are addressed in detail in OLI-produced training manuals.

THE ROLE OF COURSE COORDINATORS

OLI's study programmes are centred on course material which usually includes teaching texts (course guides, study units, textbooks, readings and assignment files), TV and radio programmes, audio and video cassettes, experimental kits, CAI programmes, supplementary materials, and tutorials and dayschools. Learning progress is assessed on a continuous basis through tutor-marked assignments (TMAs) and computer-marked assignments (CMAs). Face-to-face teaching is limited and tutorials are optional for learners. Final examination are not part of the learning and teaching system as they do not facilitate learning, but rather are used to assess learning performance when the process is concluded. Figure 6.3 provides a view of the processes in the OLI's teaching and learning system.
TABLE 6.1  Tasks and training needs of programme and curriculum designers

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Training Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Assess distance learners’ needs</td>
<td>• Overview of distance education systems</td>
</tr>
<tr>
<td>• Situational analysis</td>
<td>• Defining target groups and their problems</td>
</tr>
<tr>
<td>• Conceptualise and design appropriate needs-based curricula</td>
<td>• Assessing resources and needs of distance education and the institution</td>
</tr>
<tr>
<td>• Integrate media, face-to-face discussion and practical components of curricula</td>
<td>• Defining learning activities</td>
</tr>
<tr>
<td>• Prepare comprehensive course outlines</td>
<td>• Knowledge of teaching strategies</td>
</tr>
<tr>
<td>• Define suitable learning activities</td>
<td>• Curriculum designing skills</td>
</tr>
<tr>
<td>• Prepare ‘learning outcomes’ (objectives)</td>
<td>• Using various media in distance education</td>
</tr>
<tr>
<td>• Participate in evaluation of curricula</td>
<td>• Research and evaluation in curricular areas</td>
</tr>
<tr>
<td>• Data management and course planning</td>
<td>• Applied computing</td>
</tr>
</tbody>
</table>

(adapted from APEID, 1984)

Course coordinators play a significant role in the OLI’s teaching and learning activities. They assist in defining the curriculum and shepherding it through the various internal and external review groups of the Institute. Coordinators may also help locate existing course material and evaluate it for its relevance to the local environment. Material may originate with professional societies, commercial trainers or publishers. After negotiating for the rights to use the course material, coordinators also undertake adaptation (localisation) tasks. In the event that no ready-made course material is available, course coordinators may be assigned the task of developing courses from scratch. They are also responsible for planning the presentation of courses, including activities such as timetabling various activities (see Figure 6.3), training tutors, monitoring tutors, preparing examinations, liaison with internal and external examiners, and participating in course evaluation and revision. The demands placed on coordinators in the OLI system are high and, therefore, training is crucial. Table 6.2 summarises the tasks of course coordinators and their training needs.
FIGURE 6.3  Process view of the teaching and learning system of the Open Learning Institute of Hong Kong (adapted from Clarke and Costello et al., 1984)

TABLE 6.2  Tasks and training needs of course coordinators

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Training Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Ensure smooth course development</td>
<td>• Orientation to distance education</td>
</tr>
<tr>
<td>• Prepare learner and tutor guides, assignments, tests, marking guides, etc.</td>
<td>• Writing skills</td>
</tr>
<tr>
<td>• Arrange review and testing of materials</td>
<td>• Coordination skills</td>
</tr>
<tr>
<td>• Communicate with learners and tutors as required</td>
<td>• Course development/production processes</td>
</tr>
<tr>
<td>• Monitor tutors' assignment marking</td>
<td>• Workload scheduling</td>
</tr>
<tr>
<td>• Arrange workshops and practicums</td>
<td>• Management and communication skills</td>
</tr>
<tr>
<td>• Write test and examination items</td>
<td>• Testing and evaluation</td>
</tr>
<tr>
<td>• Train tutors</td>
<td>• Test item development skills</td>
</tr>
<tr>
<td>• Data management and course development</td>
<td>• Training skills</td>
</tr>
<tr>
<td></td>
<td>• Applied computing</td>
</tr>
</tbody>
</table>

(adapted from APEID, 1984)
THE ROLE OF COURSE DEVELOPERS

Course developers, who may or may not be course coordinators depending on the nature of the development task and overall workloads, are the primary managers of course development. Detailed course planning, or blueprinting, involves decision making about the overall structure of study material, the statement of objectives and the identification of a course assessment approach. Once plans are approved and resources allocated for course development, course developers see the project through to completion. Course development tasks and their training needs are shown in Table 6.3.

TABLE 6.3 Tasks and training needs of course developers

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Training Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Prepare blueprints for developing material and organise material</td>
<td>• Overview of distance education systems</td>
</tr>
<tr>
<td>• Write study units in collaboration with other course team members</td>
<td>• Writing and reviewing skills</td>
</tr>
<tr>
<td>• Supply ideas for visual design</td>
<td>• Knowledge of target groups and their problems</td>
</tr>
<tr>
<td>• Revise drafts</td>
<td>• Knowledge of learning processes, teaching strategies and subject matter</td>
</tr>
<tr>
<td>• Work with reviewers, editor and illustrators in preparing materials</td>
<td>• Locating resources and materials, etc.</td>
</tr>
<tr>
<td>• Test and evaluate materials</td>
<td>• Knowledge of multi-media course material production</td>
</tr>
<tr>
<td>• Review and revise galley proofs from printers</td>
<td>• Testing and evaluation skills</td>
</tr>
<tr>
<td>• Prepare feedback questionnaires, pretests and post-tests</td>
<td>• General knowledge of design, editing and printing processes</td>
</tr>
<tr>
<td>• Computer-based course development</td>
<td>• Applied computing and electronic publishing</td>
</tr>
</tbody>
</table>

(adapted from APEID, 1984)

THE ROLE OF TUTORS

The tutors’ role in the OLI system is to provide academic support to learners and, thereby, attain the objectives of the course. Their main support task is to provide feedback and motivation by correspondence. This is achieved through tutor-marked assignments. Assignment questions are determined by course coordinators, or obtained from the originating institution. Tutors grade learners’ answers and assign marks according to standards set by course coordinators. A key task for tutors lies in offering constructive teaching comments on submitted assignments, highlighting learners’ weaknesses and suggesting remedial activities. Course coordinators monitor tutors’ marking and grading to ensure good teaching standards and comparability of grading between tutors. Tutorial staff have input into assessment activities through the course evaluation process.

While the main demands on tutors are in the area of non-contiguous ‘teaching’, they are also expected to provide individualised telephone tutoring and face-to-face tuition in group sessions. Tutors keep records and provide up-to-date information on all their learners to course coordinators and the OLI. They are also encouraged to provide academic counselling when it is requested by...
learners. Table 6.4 summarises the role of OLI of Hong Kong tutors and their training needs. This training is provided by the OLI through the use of self-instructional materials, workshops, and briefing and debriefing sessions.

TABLE 6.4 Tasks and training needs of tutors

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Training Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Correspond with learners</td>
<td>• Orientation to distance education and the tutors' role</td>
</tr>
<tr>
<td>• Conduct face-to-face sessions</td>
<td>• Course evaluation</td>
</tr>
<tr>
<td>• Provide prompt, accurate and constructive feedback to learners on their progress</td>
<td>• Knowledge of subject matter</td>
</tr>
<tr>
<td>• Mark assignments and remit results</td>
<td>• Knowledge of programmes, schedules, regional services and facilities</td>
</tr>
<tr>
<td>• Provide guidance and counselling to learners</td>
<td>• Skills in communicating with learners</td>
</tr>
<tr>
<td>• Provide feedback on learners problems and procedural difficulties</td>
<td>• Counselling and human relations skills</td>
</tr>
<tr>
<td>• Maintain academic records</td>
<td>• Record keeping</td>
</tr>
<tr>
<td>• Communicate with learners</td>
<td>• Computer-based communications and data management</td>
</tr>
</tbody>
</table>

(adapted from APEID, 1984)

THE ROLE OF PUBLISHERS

Even though the Institute imports most of its courseware, learning packages delivered to learners normally contain 30-50 percent OLI-produced material. This may be due to extensive adaptation, development of supplementary material or, in a number of cases, recasting text and other media to suit both house style and normal standards of layout and design. We find, through critical examination of materials from a variety of sources, including long-established distance teaching institutions, that design leaves much to be desired. A publishing department with relatively inexpensive technology, in partnership with competent course coordinators can transform poor originals into good interactive texts. Qualities that we expect in course materials include:

• an uncluttered and a readable style;
• interactive self-instructional material with consistent visual cues, practice exercises and feedback;
• error-free text;
• user friendliness including, where possible, a sensitivity to users for whom English is not a native language;
• a well designed approach to learner assessment where assignments and examinations follow logically from stated learning objectives and the presentation of subject matter;
• stimulating design and content, and self-pacing mechanisms;
• strong visual design and a sensible use of mnemonics;
• consistent typography;
• well integrated print and non-print media; and
• media design and layout that follows instructional design norms.

Publishing departments may also have the responsibility to obtain rights to use intellectual property. It is becoming an increasingly complex and expensive task.
that can retard rapid development of courses, especially those where the originating institution has itself entered into contracts which define the limits of their use.

Even though the scope of publishing may be perceived to be limited at the OLI, our experience seems to indicate otherwise. Well trained and skilled staff must respond to a variety of demands. Currently, no provisions exist for training needed in publishing departments. This is an area where immediate action would prove most useful. Table 6.5 summarises these tasks and their training needs.

**TABLE 6.5 Tasks and training needs of publishers**

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Training Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Text editing and mark up</td>
<td>• Overview of distance education</td>
</tr>
<tr>
<td>• Collaborate with authors to remove content ambiguities and confusions</td>
<td>• Knowledge of distance teaching techniques</td>
</tr>
<tr>
<td>• Language editing</td>
<td>• Editing skills</td>
</tr>
<tr>
<td>• Adjust readability, logical flow, sequencing and presentation of materials</td>
<td>• Presentation, layout skills</td>
</tr>
<tr>
<td>• Visual design and illustration</td>
<td>• Marking-up manuscripts for printing</td>
</tr>
<tr>
<td>• Proof-reading</td>
<td>• Proof-reading skills</td>
</tr>
<tr>
<td>• Ensure that printed text is appropriately related to non-print media</td>
<td>• Knowledge of different media and their role in teaching</td>
</tr>
<tr>
<td>• Contract printers</td>
<td>• Knowledge of printing stages</td>
</tr>
<tr>
<td>• Arrange copyright clearance</td>
<td>• Copyright clearance laws and processes</td>
</tr>
<tr>
<td></td>
<td>• Electronic publishing</td>
</tr>
</tbody>
</table>

(adapted from APEID, 1984)

**PROBLEMS AND CONSTRAINTS RELATED TO TRAINING**

While the Open Learning Institute of Hong Kong encompasses all the subsystems of a typical distance teaching institute, many of these are on a smaller scale as the Institute is relatively new. Figure 1 indicates some of the essential relationships in the institution and suggests that a training approach must take into account institution-wide needs. In so many words, our system is highly interactive.

The problems and constraints related to staff training in an institution modelled like the OLI are fundamentally the same as at other distance teaching institutions. At the generic level we are as constrained as other systems by availability of funds and time to implement training schemes. Governments and policy makers still find it difficult to accept that distance education is reliant on teams of highly competent specialists who are expected to apply their skills not only in their individual capacities, but also in groups. Therefore, funds dedicated to training are difficult to garner. There are several main training-related problems facing those who manage distance teaching institutions:

1. Team training current training programmes are not generally designed on a team training basis. This is surprising in that many institutions claim a team approach to course development projects and, as well, distance education
operations are highly integrated. There are, however, good examples to be found in the industrial sector although these are almost invariably in-house training programmes.

2. Supply of trainers top-quality trainers are few and far between. The traditional pool of distance education trainers has resided in Britain, Canada and Australia. They are most often available within the terms of a bilateral aid package which does not necessarily mean they are obtainable when needed. There is, however, a growing pool of talent in the other parts of the world that can be nurtured and made available for those needing it. Such provision need not involve bilateral aid programmes.

3. Time release for training training most often occurs on the basis of face-to-face sessions in workshops, seminars and, occasionally, short courses. This is fine for training one or two individuals from each organisation, but common sense dictates that such methods are inapplicable for team training. No institution can afford to release large numbers of its staff for long periods.

4. Awards and accreditation for training participants in training programmes may wish to be recognised with formal awards. Given the small number of individuals desiring these qualifications at any one location, it is difficult to convince award granting agencies to respond.

5. Transportable training materials existing training material tends to be location specific and its adaptation is both costly and time consuming; however, the most immediate answer to needs involves in-house training based on such adapted material.

6. Appropriate technology the increasing availability and decreasing cost of technology, especially in the area of course development, electronic publishing and communications, cannot be ignored by distance education institutions anywhere. Trainers must be up to date and sensitive about issues of local attitudes on technology. Institutions will want to ensure that their technical training programmes reflect available technology and their plans for future development.

In general, distance education institutions ought to move away from prevailing training practices by:

- removing the north-south direction of training. There is enough experience and incipient trainer talent at regional levels to permit the development of local training networks. This is a sensible way of utilising limited local resources for greater advantage. Such an approach would not only develop local capacity for training, but also reduce training costs;
- producing generic training materials which can be adapted and applied in both distance and face-to-face modes at local levels; and
- establishing a system for granting accredited awards so trainees may use them to further their career track in distance education.
CONCLUSION

This paper identifies the special nature of the Open Learning Institute of Hong Kong, particularly its declared intention to identify, acquire and adapt course material developed elsewhere. The paper also addresses those elements of the system, especially in the areas of course development, that require specialised training programmes. Training materials and approaches designed for our practitioners can very well be applied at other institutions and, conversely, the OLI keeps a sharp eye turned toward others who are developing training approaches and material that can be applied here. The critical need for informed and trained technical and professional distance education practitioners is not in question. A concerted effort to apply limited resources in the development of generic training material is, however, of paramount importance.

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CHAPTER 7

STRATEGIES FOR COLLABORATIVE STAFF TRAINING IN DISTANCE EDUCATION

Janet Jenkins

Training is collaborative when personnel from more than one institution take part in a training activity. This can mean trainers from different institutions teaching together, and it can also mean trainees from different places learning together: sharing of experience is in itself a useful component of training. People from different institutions may also work together to develop training materials. If staff training in distance education is to be taken seriously, then collaboration is essential to develop and sustain local and international training programmes.

Distance education is still a relatively new field of work, and it is becoming widely accepted that those entering the field need specialist training. But newness alone does not make the case for training. We need to look more closely at why training may be needed, who needs training, and what kind of training it should be.

WHY TRAIN?

I had no special training for distance education and I have been trying to analyse what I missed. My first tasks were programme evaluation and editing texts. I lacked specific skills for both these tasks and had to pick them up on the job. I made plenty of mistakes which might have been avoided if I had received training, but these were not serious and I got on reasonably well. Looking back, however, I can see a major shortcoming. I was working without a frame of reference. I had no concept of distance education, and without an organising framework my work lacked a clear direction and was less effective than it could have been. I would have benefitted from an induction course in distance education — although the term had not even been coined then in 1966.

I believe my experience remains relevant. People bring to distance education their existing expertise. To work effectively they need to acquire new skills and understand the context in which old and new expertise is to be applied. Thus training for newcomers needs to include two strands: induction to distance education, and the acquisition of additional technical skills.

It could be argued that both skills and an understanding of distance education could be acquired on the job. From the perspective of the teaching institution, there are two main reasons why this is a poor argument. First, distance education requires its full time workers to take on multiple roles and depends on a substantial cohort of part time workers, such as course writers, to complement the full-timers. Discovery learning is time consuming, and inappropriate for such a complex educational process. Second, the nature of the distance edu-

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cation process is such that mistakes made at the design stage can only be rectified later at great cost, counted in time and energy as well as money. It is therefore important that those involved in programme design and development are well prepared. Staff training ought to be a priority for new institutions, while an established institution which introduces a new programme will probably recruit new staff for that programme who will also need training.

Training produces and fosters commitment. Many people who enter distance education have been attracted by a sense of its potential; their enthusiasm grows as they understand what to do and why. The benefit to their institutions can be great, with benefits in the longer term to the nation as well. Distance education is only gradually being accepted into the mainstream of education. The professionalisation of the workforce will help that process, particularly where initial and further training helps the committed acquire confidence, status and recognition.

WHO SHOULD BE TRAINED?
WHAT SHOULD THE TRAINING BE?

All distance educators need training. Who are these people? Distance educators use a confusing range of job titles for different basic functions, while different patterns of work organisation mean that in some institutions individuals have multiple roles. It may be helpful simply to offer a list of categories of staff in distance education, using four key functions as a basis for classification:

1. administrative staff, ranging from managers and planners to junior administrators
2. those concerned with course design and development, including writers, editors, media technicians and producers
3. those concerned with course presentation, including tutors and counsellors
4. those concerned with research and evaluation.

We can start with an understanding that there is a common training need for everyone when they are first introduced to distance education. Prior to any specific job training, everyone needs a general orientation to distance education. Such training can vary in length and depth, but it has a common core: the world over, covering the purposes, potential and methods of distance education. In addition each institution needs to provide its staff with guidance on its own particular aims, role and methods and on its expected student body. A dominant theme of any initial orientation programme should be the student-centred nature of distance education. People need to perceive how every distance education system is constructed round the requirements of learners.

Specifying training needs within each functional area is more difficult. I do not here consider in detail the training agenda for different categories of staff, but in Table 7.1, I provide a Training Model as an explanatory framework. The table is intended to serve as a framework for planning training, and the entries in each column are intended to be indicative rather than specific and comprehensive.

We can use the case of a tutor to illustrate these stages. When we appoint correspondence tutors we assume that they have subject expertise (Stage 1) and that they are trained teachers (Stage 2). We need, however, to train them to teach by correspondence (Stage 3) and we may need to provide them with additional training in the special requirements of teaching their particular discipline at a distance (Stage 4). And at every stage let us remember that tutors need to be encouraged to relate their new knowledge and skills to their local institutional context and their own learners.
<table>
<thead>
<tr>
<th>Personnel functions</th>
<th>Stage 1 Basic expertise</th>
<th>Stage 2 Educational application</th>
<th>Stage 3 Distance education application</th>
<th>Stage 4 Specialised extension</th>
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<tr>
<td>1. Planners, managers, administrators</td>
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<td>educational administration</td>
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<td>2. Course designers</td>
<td>subject knowledge</td>
<td>curriculum design and materials development</td>
<td>design of self instructional materials</td>
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<tr>
<td>a. academics and writers</td>
<td>copy editing and design</td>
<td>editing and design of educational materials</td>
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<td>b. editors and instructional designers</td>
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<td>c. media producers</td>
<td>subject knowledge</td>
<td>teacher training and adult education</td>
<td>teaching at a distance</td>
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</tr>
<tr>
<td>3. Tutors and counsellors</td>
<td>research techniques</td>
<td>research in education</td>
<td>research in distance education</td>
<td>specialist skills</td>
</tr>
<tr>
<td>4. Researchers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The model identifies four stages of acquisition of expertise:

**Stage 1** prerequisites: general education to an appropriate level such as a first degree at university

**Stage 2** basic pre-work training: professional training or experience at the beginning of working life

**Stage 3** basic in-work training: essential training in aspects of distance education related to their role

**Stage 4** further in-work training: advanced training in specialist aspects of distance education

Entry into distance education comes generally after Stage 2. Occasionally however training may be needed in a Stage 2 skill that is essential for distance education and not commonly found among our recruits. For example those recruited as tutors may lack expertise in techniques of adult education. Stages 3 and 4 are phases of development occurring after beginning work in distance education.
IMPLICATIONS OF THE MODEL

Table 7.1 enables us to tackle a number of questions about training:

1. **What expertise should new recruits to distance education be expected to have?**
   - Most new recruits should already have appropriate Stage 1 and Stage 2 skills.

2. **What training should the institution expect to provide?** Normally we would expect to cover Stages 3 and 4 in staff development programmes. In some circumstances the institution may arrange Stage 2 training.

3. **At what stages in the staff member’s career should that training be?** Stage 3 could be immediately after appointment. Stage 4 can be combined with Stage 3 or follow when the staff member has more experience and is better able to benefit.

4. **How extensive should it be?** For part-time staff, especially those on short term contracts, training needs to be brief; for full-time permanent staff it can be longer and phased to encourage the steady consolidation of expertise.

5. **What expertise should trainers possess?** Besides the job-related knowledge and skills that they must pass on to trainees, trainers need to be versed in training techniques and need confidence in their capacity to communicate effectively.

The model indicates clearly that training should follow a sequence. Broad educational training (Stage 2) must precede applications in distance education (Stage 3), which in turn must precede specialist applications (Stage 4). For example, training a writer to teach music at a distance must come after training in the preparation of self-instructional materials, which in turn comes after training in musical education and in the subject of music itself.

Given that there are linkages between roles and functions in distance education, we can also consider broader questions, such as what course developers should know about teaching by correspondence. A vertical reading of the columns in the training model suggests how we might proceed. We might conclude that all those who intend to make a career in distance education should in due course study all those items listed as Stage 3. The column reads like an outline syllabus for a diploma in distance education. There are in fact two options for those undergoing Stage 3 training. They may proceed horizontally to Stage 4 in the model, concentrating on developing expertise in their main area of interest, or they may follow, so to speak, a vertical path, covering all the topics in Stage 3. They may then go on to specialist Stage 4 studies. The first approach is appropriate for those who prefer to follow a narrow discipline-related path of career development, while the second is right for those who feel committed to distance education as a permanent career. I should also mention that a diploma based on Stage 3 combined with general orientation to distance education is appropriate pre-service training for those who wish to become distance educators.

We may also use the training model to consider how and when to meet specific training needs. For example, the terms of reference for this meeting define four specialist areas of concern to COL:

1. Planning and management of distance education institutions
2. Instructional design and course development
3. Application of new technologies, including computers, in distance education
4. Modifications and arrangements for use of course materials from other institutions.

We can immediately see that the first two areas are covered in the training suggestions for the first and second categories of staff. Area 3 is a specialist area of training for certain administrative and production staff, and therefore needs to come at Stage 4 after basic job training in distance education. Area 4 is also a
specialist area, of concern in different ways to production and administrative staff.

Sometimes institutions need to recruit people without adequate Stage 2 training. If this occurs, then initial in-service training could combine Stages 2 and 3 and may be interdisciplinary. For example, training in techniques of management may need to be covered along with distance education techniques. Where an interdisciplinary approach occurs, there may be a need for collaboration in training.

Later training (Stage 4) is highly specialised, and here again there is likely to be a need for collaboration, as each institution will only have a small number of personnel requiring each specialism, with a consequent need to look outside for training opportunities. Such considerations lead us to consider how and where training may take place, and who will be the trainers.

**TRAINING MODES AND STRATEGIES**

Training can be arranged in the following ways:

**In-house**

**Informal**
1. peer attachments: someone new to a job works in partnership with an experienced person doing the same job, who demonstrates and explains what to do
2. introductory work experience: a new member of staff spends a short time in every department in order to become familiar with the work of the entire organisation (I am not sure that this is a particularly useful strategy although I have heard it advocated and therefore note it)

**Formal**
3. organised training sessions: seminars, workshops and short courses ranging from a few hours to several weeks
4. self-study: using training packages devised or approved for in-house use
5. study for professional qualifications provided by the institution (using distance or face-to-face mode of study)

**Outside**

**Informal**
6. fellowships: time spent in another institution working in partnership with someone doing a similar job. (The reverse of this is an outsider visiting as a consultant and training one-to-one by working with an individual or with several individuals in turn)
7. study tours: visits to several institutions to learn how they work, in order to apply that knowledge to one’s own work

**Formal**
8. organised training courses: seminars, workshops and short courses ranging from a few days to a few months
9. study for professional qualifications through a period of attendance at another institution
10. study for professional qualifications offered by another institution through distance study (Although this last option allows people to be trained without going away, the training is designed, taught and validated by outsiders and cannot therefore be classified as in-house).
These training strategies are not mutually exclusive, and an institution needs to provide a number of different training opportunities for its staff to satisfy the needs outlined in the Training Model. Courses may be on an occasional or regular basis, with access and strategies varying according to whether staff are part-time and short-term or full-time and permanent. It is desirable for institutions to organise training so that there is a coherent long-term staff development plan.

It may seem as though the informal strategies are the least demanding to implement. This is not the case. Informal strategies depend on competent people being willing to give up time. For peer attachments, the experienced staff member must allow double time for his or her work throughout the period of attachment, first to demonstrate an activity, and then to supervise and help the trainee to do it. Inter-institutional fellowships are particularly demanding, as visitors must be accommodated even if pressure of work mounts up unexpectedly, as so often happens in distance education.

Formal strategies all require trainers who not only understand the job of the trainees but are also competent in training techniques. In the absence of in-house trainers, institutions are forced to look outside for training. New institutions inevitably lack in-house training capacity and are therefore likely to send staff out for training or, alternatively, seek trainers who can come to them. Where outsiders are involved in training, it is desirable that they work together with in-house personnel, in order that the training may be related to the institutional setting.

The analysis of training needs in the Training Model suggests that there is a common core of training in every area. This core needs to be complemented by examination of the local setting and adapted accordingly. Training from outside, including study of a distance course offered by another institution, can lack this localising element. We may need to consider home-based seminars or assignments to precede or follow up outside training and, for distance study, adapting or extending courses to suit a particular national setting, or using tutors from the home institution to mark and examine trainees' work.

Training that leads to a professional qualification is likely to take one or more years to complete, and is only suitable for those committed to a career in distance education. Such training need not always consist of a single programme of study. It should be possible to gain a qualification by completing a series of training modules which may include both distance and face-to-face study, and which may be offered by different providers but recognised by the award-giving authority.

**COLLABORATIVE SETTINGS**

Our consideration of training needs, modes and strategies has thrown up a number of potential collaborative settings, which can be used to illustrate how collaboration can be most effective.

**Collaborative in-house training**

1. *Basic training in distance education.* One or more outside trainers works with local partners on short courses providing basic (Stage 3) training in aspects of distance education, such as training course writers. Such assistance is particularly valuable for new institutions which lack training expertise amongst their own staff. It is most effective in circumstances where local partners are trainee trainers, who subsequently run training programmes independently. Continuity is also desirable, with the same institutions and personnel working together until the new institution becomes self-sufficient.
Example IEC distance education specialist worked with IGNOU trainee trainers to provide orientation for new academics.

2. **Training covering distance education and other aspects of education.** A specialist trainer in distance education may work together with another specialist who covers Stage 2 skills. For example, a distance educator may train teachers to teach by correspondence alongside a specialist in adult education who trains them in adult education techniques. In many such cases collaboration may be arranged using local resources, but in countries where expertise in certain Stage 2 skills is in short supply, international collaboration may be necessary. For example, outsiders may be needed to train television producers in techniques of making educational programmes, while experts in distance education provide training in how to work in a multi-media setting. A distance teaching institution should not seek to develop an in-house capacity for training its own staff in Stage 2 skills but rather concentrate on training related specifically to distance education (Stages 3 and 4).

Example Namibian teachers writing English language courses needed help from an English language teaching expert to design their units (Stage 2), as well as guidance from a distance education expert in the development of self instructional materials (Stage 3).

3. **Specialist training.** A specialist distance education trainer collaborates with a subject specialist, combining Stage 3 and Stage 4 training. Course writers may be trained on short courses by a combination of a specialist in designing distance education materials and a specialist in teaching a particular subject at a distance; for example there are special difficulties in teaching science at a distance, and an experienced practitioner may work with a trainer to help new science course writers. This strategy is best reserved for institutions with relatively large groups of writers, or for particularly difficult subjects. It can also be used in the training of tutors, who are often recruited in fairly large numbers. For example, a health education expert may work with a distance education expert to train tutors for a health course. International experience can be particularly valuable when introducing courses in relatively unusual subjects like health.

Example Distance education expert from Ethiopia works with health education expert from AMREF in Kenya to train Namibians as distance tutors on a health course.

**Collaborative outside training**

4. **General basic training.** A group of trainees from different institutions come together for training in one or more aspects of distance education as set out for Stage 3. Trainers may also be drawn from different institutions. Such training will normally take place on a national or regional basis, and be for staff of institutions or programmes unable to provide in-house training on a regular basis.

Example Training programmes for course writers run in Kenya on a regular basis, with trainers largely from the University of Nairobi and trainees from a number of Kenyan and other regional institutions involved in distance education.

5. **Specialist training.** A group of people with shared interest from several different institutions gather for advanced training. Specialist training (Stage 4) in particular subjects may only be wanted by one or two people in any one institution, hence the need for inter-institutional short courses. An example could be an international workshop on agricultural education at a distance. (See also 9 below.)
Example: This appears to be a largely unmet need. I cannot identify a recent example of an inter-institutional advanced course.

6. **Professional training programmes.** Individuals committed to a career in distance education may attend extended training programmes, for several months or more, perhaps leading to a professional qualification. Many travel abroad for such programmes. An important element of such training is always the sharing of experience amongst professionals, whether they are teachers or trainees. This could be enhanced by involving more practitioners as teachers on such programmes.

Example: University of London/IIEC training programmes in distance education up to Masters level where a wide range of international experience is always represented.

**Collaboration in materials development**

7. **Development of training materials.** Experts from more than one institution work together to design and develop training materials. This is difficult when the collaborators work from their separate institutions, but costly if they are brought together to work. Potentially it avoids duplication of effort and could result in a higher quality product. Adaptation or extension of existing training materials is another possibility which needs exploring.

Example: Current development of Masters programme in distance education, which involves four universities working together on materials development.

**Collaboration in informal training**

8. **Fellowships and visits.** A trainee learns by watching and doing. Training fellowships are best tailored; and particularly useful if linked with a training course. Well-planned visits are also useful, and should be open to all (senior staff tend to get more than their fair share). As internships attachments and visits are individualised, they are rather expensive and probably under-rated and under-used.

Example: An administrative officer from the University of Nairobi completes a general course in distance education at London University and then has a month’s training fellowship to acquire some basic computing skills and examine computerised systems of student record keeping in British distance education institutions.

9. **Self-help training.** In some cases advanced training needs no specialist training input. Interest groups can meet to share experience and help each other informally to develop expertise. Such meetings are particularly valuable for those involved in new ventures in distance education, such as the training of trainers.

Example: An interest group on nurse education at a distance was set up by ICDE members; meetings resulted in publication of a book.

**THE NEED FOR COLLABORATION**

Collaboration in training distance educators is necessary, once institutions give priority to training and particularly once training is considered to be a component of in-house staff development programmes. It is necessary and/or desirable for four reasons:

1. there is a lack of trainers; new institutions lack staff with sufficient experience to train, and established small units may lack training capacity
2. advanced training is specialised; because it applies to small numbers in most institutions, it often needs to take place in inter-institutional groups or through exchanges
3. exchange of experience between institutions is a valuable component of training and could be essential for some categories of staff
4. training at a distance or from self-study packages is an important mode of training, to be used as an alternative or complement to other modes of training; since there is a common core of skills and knowledge to be acquired by each category of staff, collaboration in the preparation and use of training materials is desirable.

Barriers to collaboration

An earlier section sketched a number of collaborative settings, with examples. There are a number of constraints which affect all forms of collaboration, and in doing so reinforce a tendency for cooperation to take the form of aid rather than exchange.

In many distance education institutions, management lacks commitment to training, an understanding of its benefits, and the resources to initiate a training programme. Many directors acknowledge that training is useful, but do little to introduce a training policy. Perhaps one or two senior staff are allowed to go for training abroad, and the occasional in-house seminar occurs, probably unrelated to the needs of the staff. Conditions of employment may restrict training, such as rules which prevent new staff from travelling abroad, at the very time when they need experience elsewhere. Managers may not see the need to bend the rules.

Such a laissez-faire approach needs to be replaced by a long-term staff development strategy, which will require resources. With foresight and commitment it may be possible to allocate finance, and designate staff to be trained as trainers, if training opportunities at that level are available. Few are at present, so little encourages managers to change their views.

Inter-institutional and international constraints are even greater. If there is to be collaboration and exchange, both partners must be willing; often visitors arriving for training fellowships are seen as a burden, an interruption to work. The attitude needs to change to receptivity. Although people from poorer countries may learn more from working in an environment that resembles their own than from the rich world, movement is often easier between rich and poor countries. Horizontal movement can be impeded by currency and visa restrictions.

Bilateral agencies give added encouragement to north-south movement through their preference for exchange between their own country and the recipient. They also like to package their support to institutions in the form of a project. This has the advantage of coherence and continuity, especially when the project creates an enduring link between institutions; it has the disadvantage of excluding components which do not match the donor’s guidelines, such as regional or third country activities.

Finally, international collaboration on training is, like in-house training, constrained by the shortage of trainers.

Despite these constraints, better use could be made of existing training options. One reason why training opportunities are underused is that information about them does not reach all those that need them. A second reason is that mechanisms to make collaboration easier need to be put in place. The Commonwealth of Learning can have a role in this.
REQUIREMENTS FOR COLLABORATION

The first requirement for easier collaboration is information. What training opportunities are available? What face-to-face courses and what materials? What are the training needs of staff in distance education? How can they be met? What should be taught and who should teach it? What experience do they need and where can they get it?

A contingent requirement is consultation, needed to collect and disseminate information and discuss and arrange forms of collaboration. Who will collaborate with whom? Who provides training? When and how? Who will be trained?

Collaboration cannot occur without resources. Both finance and personnel are needed, and donor agencies need to be prepared to release funds, to match whatever contributions the recipients of training are able to make. And, if the partners in collaboration include donor agencies as well as teaching institutions and their governments, flexibility is needed. We have seen that effective staff development requires a combination of strategies. Donors need to be flexible in their provision of funding and technical support, while employers of trainees need to allow individuals to follow a suitable sequence of training activities, if necessary by-passing the normal rules.

Finally collaboration requires ease of movement between partners. Mobility is possible only with funds that may be used for international travel and, where travel for nationals is restricted, the active support of employing institutions and their governments. That brings us full circle to the need for institutional commitment to training, which is more likely to develop as more training opportunities become available and information about them is widely disseminated.

AN AGENDA FOR THE COMMONWEALTH OF LEARNING

These requirements suggest an agenda for action for The Commonwealth of Learning. The first step is to create conditions in which collaboration is easier; it is already within the terms of reference of COLIS to assemble some of the information required, and the present meeting will contribute more information, as well as starting what may develop into a permanent process of consultation.

As the mechanisms for collaboration are put in place, COL will need to encourage proposals for training which corresponds to priorities and which is not already available. COL has identified four areas where initiatives must clearly be encouraged. In addition, the training of trainers for all aspects of distance education is a priority; all other training is conditional on the supply of trainers.

The analysis of training needs presented in this paper suggests that there is a common core of knowledge and skills needed by distance educators everywhere. First, everyone needs general orientation to distance education; then, there is a common core to training for each category of staff at Stage 3. COL can help by defining what should be included in that common core, and by identifying or developing training materials which cover it.

Very little advanced specialist training (Stage 4) is available. COL needs to consider whether it is a priority to provide this. Certain of COL’s stated training priorities can be classified as advanced training. COL may also wish to encourage a wider range of advanced training options.

The lack of training provision in certain areas, in particular the lack of training for trainers, should lead COL to initiate some training activities itself rather than merely support initiatives by others. But that, along with the whole agenda set out above, is a matter for discussion.
CHAPTER 8

CONCLUSIONS

The quality of distance education depends on the quality of teaching materials and the efficiency of delivery and support systems. Staff need specialist training in order to achieve and sustain quality.

What should that training be, and how can it be conducted? This concluding chapter puts forward a proposal for curricula for key areas, suggests strategies for training, examines constraints on its effectiveness, and concludes with a blueprint for action for COL.

THE TRAINING AGENDA

The Round Table focused on the key areas of distance education itself, planning and management, instructional design and course development, and technology. Working groups attempted to devise core curricula for each area, which are presented below, and can be used to form the basis of any training programme.

The curricula are related to areas and functions and not personnel. Different training areas cannot be neatly attached to different categories of staff. Course developers need to understand the uses of technology, academics need to acquire skills in administration, and so on.

A difficulty arises as soon as discussion of training moves beyond objectives. While objectives remain constant from institution to institution, the content and extent of training needed varies with the context. Some institutions have many full-time staff each with distinct functions; others have a few full-timers with multiple functions and many part-timers with a single function. Full-time staff may benefit from training that is, at the outset, relatively broad and general, while part-timers may need narrow and specialist training.

There is, however, firm agreement that training needs to start with solid training in fundamental aspects of distance education and its key functions.

General Orientation to Distance Education

All those working in distance education, including those planning new institutions, need general basic orientation to distance education. The general orientation should cover themes such as:

- Distance education (philosophical issues)
- Socio-economic considerations
- Cost-benefit considerations
- Major models and institutional systems
- Teaching and learning at a distance
- Media options
- Recent developments worldwide
- The Commonwealth of Learning and its agenda

Professional and technical staff need to follow an orientation programme covering these topics before going on to more specialist training.
Distance Education Policy, Planning and Management

The following categories of staff all need some training in policy, planning and management:
- Senior administrators in distance education institutions
- Directors of extension in mixed mode institutions and their deputies
- Middle managers in distance education institutions
- Academic staff.

The target groups can be subdivided into those who decide policy within an institution and those who implement it. Both need to understand the issues which lead to decisions being made. Academic staff, as implementors, are assumed to need some training in planning and management.

The following broad objectives seem to apply at varying levels of detail to all four target groups:
1. Understand the value, purpose and contribution of distance education;
2. Understand how the system works;
3. Be able to reflect critically on the institution's systems, objectives, options and effectiveness;
4. Be able to manage and modify the system to achieve goals and effect improvements.

In addition to those topics covered in the basic orientation, senior staff need to study the following, all in the context of distance education:
1. Strategic analysis and planning
2. Financial management – costs, budgeting and economics
3. Student records management – enrolments and database management
4. Management of materials production and delivery – planning, systems and resourcing
5. Student support services and regional services
   - management and operation
6. Course management – institutional
   - management of course profile
   - programme budgeting and control
7. Course management – course controller level
   - handling assignments, tutorial staff, regional travel, contact sessions, student assessment, etc.
8. Organisational environment and organisational culture
9. Promotion and advocacy of distance education

While the list of possible training areas is extensive, the following may represent priority areas:
- Library services
- Marketing
- Database management
- Publishing, warehousing and distribution
- Enrolment and student records
- Course acquisition, modification and copyright
- Open learning

Instructional Design and Course Development

The process of materials development can be divided into several stages:
planning programmes and courses; developing courses; producing materials: implementation; evaluation; maintenance and revision. At each stage, the objectives and agenda for training relate immediately to the functions to be performed.
Planning of Programmes and Courses
Planners should be able to make appropriate decisions. They need to:
- know how to respond to analyses of needs,
- evaluate the information about costs in the light of identified needs and the resources available,
- present/justify the rationale behind the courses/programmes,
- put in place the organisational structure for purposes of materialising the courses/programmes,
- prepare the schedules for course/programme preparation,
- identify the content, specify the media-mix and the course teams for particular courses,
- specify the aims and objectives, assessment procedures and media use for each and every course/programme, and
- cost a course/programme.

Developing Courses
Course developers should be able to:
- plan units allotting portions to appropriate media (keeping in view the aims and objectives of the course)
- search for and collect relevant materials to be used for developing the materials – also suggest readings
- write self-instructional units
  - write objectives (in behavioural terms)
  - select and organise content (content maps ...)
  - use access devices, learner activities and self assessment devices
  - use appropriate language, style and presentations
- edit the self-instructional materials
  - evaluate drafts in terms of objectives and the criteria outlined above
  - transform and/or modify materials
  - communicate effectively with other writers to bring about changes, keep deadlines, etc.
- pre-test the self-instructional materials
  - design and carry out tests
  - analyse data and draw conclusions
  - communicate those conclusions to the concerned
- prepare media notes, briefs and scripts

Production
Production staff should be able to publish texts and create non print media materials.
In publishing, they should:
- design and lay out self instructional texts
- copy edit
- illustrate
- proofread
- clear copyright
- organise production schedules
In non-print (video & audio) production, they should:
- prepare production scripts
- identify and contract presenters, actors, commentators, etc.
- organise recording/filming
- edit
- design graphics
- manage production
- clear copyright
Implementing Courses
Course implementers should be able to:
- coordinate course delivery
- organise tutorials
- organise assessments and examinations
- develop monitoring schedules
- manage tutors
- articulate with external examiners and other reviewers

Evaluation
Course evaluators should be able to draw up an evaluation strategy, apply that strategy, gather and analyse data and report findings to appropriate authorities.

Maintenance & Revision
In this phase the course developers may have to repeat the same type of tasks as in developing courses.

Technology in Distance Education
People new to distance education find it difficult to understand the issues of choice of technology. Even people working in long-established institutions may not be fully aware of media potential. A general induction or orientation package therefore seems to be needed, with the aims of helping people
- to understand distance education
- to be aware of the strengths and weaknesses (including cost effectiveness) of different technologies for distance teaching itself and for its administration.
The package could take the form of a thirty-minute video and a booklet with facts. Such a package could be available in all distance teaching institutions.
In addition, different categories of staff need further training. Planners and managers need general basic training which will help them to
- develop appropriate strategies for selecting technologies
- understand the implications for the organisation structure of an institution in using different media
- keep up to date with technological change.
Training should cover different technologies and the use of media and computers in distance education, including interactive components such as computer conferencing. The choice of technology depends on the local context but training should help people become aware of new developments and encourage innovation.

Topics will include strategies for media selection; uses of print, audio, television and computers; evaluation and choice of course models.
This training is particularly important, as planners may inadvertently make decisions which will inhibit the later use of technology appropriate to the educational task in hand.

Course designers, subject experts and instructional designers will need to be able to:
- understand the strengths and weaknesses (including cost-effectiveness) of different technologies for distance teaching
- develop appropriate strategies for selecting technologies for a particular course
- help ‘designers’ to develop courses which exploit fully different technologies appropriate to specific target groups and to the institutional context.
• specify or commission appropriate design for different media components for
  such courses, in consultation with media specialists
• provide hands-on experience of different technologies
• re-examine, where appropriate, the use of those technologies currently in use
  within an institution
They will need to cover topics similar to those itemised for managers, but
they will need to spend more time considering detailed examples and following
demonstrations of application. An element of ‘hands on’ training is important.
Finally, there are the media specialists such as editors, producers, script
writers or computer programmers. They already know their media specialism, but
need training which helps them adapt to the new environment of distance
education. The training should have as its objectives to help them to:
• increase understanding of distance education, and the needs of teachers/stu-
  dents at a distance
• increase understanding of educational needs and approaches within their
  own specialism
• improve their specialist, technical expertise
• keep up to date with technological change

FURTHER TRAINING NEEDS
The agenda above represents several priority areas but is by no means com-
plete. The following areas were not considered in detail at the Round Table but
must be added to the list.

Student Support Services
The training of tutors, counsellors and study centre organisers is important
for any distance education institution. Study centre organisers need to learn
how to train tutors and counsellors. COL plans to consider this area at a sepa-
rate meeting concerned with the development of student support services.

Training in the Adaptation and Use of Materials
In the case where materials produced by one institution are used by another,
there are special training needs. Discussion of the issues raised in Chapter 6
concluded that most courses require some adaptation or modification before
use in a new context. This may be changing the materials or preparing addition-
al materials such as a study guide. Staff involved in organising the use of such
courses need training that cuts across the key areas discussed above. It must
include training in the specific skills of recasting materials and in the skills of
tutoring the courses in the local setting.

Research
Programme and course evaluation have been mentioned on several occasions
and must also be considered a priority. Candidates for training are instructional
designers and the staff of evaluation units. COL intends to develop separately
its strategy on research, and in that context will examine training needs.

Training the Trainers
Key resource people within distance education institutions are the trainers of
the future. Through the following training programmes such as those suggest-
ed here, they will acquire the knowledge, experience and commitment to train
others. They will also need to learn training techniques. The availability of train-
ing curricula and high quality materials will help them.
STRATEGIES FOR TRAINING

Four strategies for training emerge as outstandingly important, and COL will use, or encourage the use of, all four of them. The four are:

- training workshops
- self-instruction and distance learning
- training fellowships and internships
- special training institutions/units

Workshops

First and foremost, institutions would like to be able to conduct training in-house. While recognising the need for occasional overseas training, particularly for key personnel, on-the-job training is a priority.

Workshops should be a regular part of institutional training programmes, combined with other strategies. For course development, for example, there could be a set of modular training manuals which could be used for self-instruction by individuals or in training workshops by groups. For training in the use of technology, a video training package could be followed by a three-day workshop.

Workshops have the advantages of speed and efficiency; a group of people completes training over a short period, in conditions where they get maximum feedback and support. These advantages make them particularly attractive as a means of training key personnel to become in-house trainers.

Self-Instruction and Distance Learning

The need to have available high quality training materials was expressed several times. Distance education could perhaps learn something from industry, not only concerning the design of training materials but also more broadly concerning training practice and policy.

The University of Papua New Guinea explains that:

The greatest need of the Extension Studies Department in the area of staff development is a programme of on-the-job training. While in country workshops with outside assistance and overseas training programmes are necessary at times, the main emphasis should be to provide a means by which a new staff member of anyone wishing to upgrade skills can get assistance. The logical approach would seem to be to utilise the method of instruction which we know best – distance learning.

For each of the priority training areas discussed above, there are quite specific suggestions for training materials, occasionally in video form, but usually in print.

For example, there could be set of training modules which deal with different stages of course development. These might be designed to be used for different levels of training, with trainers in institution using the modules with new recruits. Modules could be on the areas shown in Figure 8.1.
Such materials could have, or be adapted for, several uses – as workshop resource material, as self-instructional modules or as distance learning programme. The Sir Arthur Lewis Community College suggests, for example, that methods of training should ensure that trainers pursue at least one course or one topic within a course through the distance teaching mode in order to internalize the experience.

Training Fellowships

Training fellowships or internships could usefully play a part in training all categories of staff. It is, however, of particular importance for managers and administrators to visit other institutions and see for themselves how distance education operates elsewhere. Patterns of provision could include structured visits, study tours and travel fellowships.

Special Training Institutions/Units

There is no doubt that regional training facilities are needed to train distance educators. These could be mobile facilities, with training events being hosted by different institutions in turn, or based on a regional unit, as suggested by the University of Lagos:

One or two trainers from any of the countries that have made more progress could be sponsored to regional centres to conduct training for key full-time members of distance learning institutions in the region. Those thus trained could then train others in their own institutions. If training kits can be developed, these would certainly assist those so trained in training others.

India has a slightly different plan, to set up a national staff college for training distance educators. The option chosen in each case depends on the local context.

Training units or colleges could coordinate workshops and the distribution of training materials. They might also be the local operators for distance-taught training programmes in distance education.
Perspectives on Strategy

How is a particular training strategy to be selected for a particular purpose? None of the strategies is superior to the others, and the best solution is to make use of a range of approaches to training. Nevertheless, some strategies are particularly appropriate for certain areas of need. Training fellowships, for example, are particularly valuable for managers and administrators, providing an opportunity to see how other institutions operate. For training in the use of technology, it is beneficial to have training materials that themselves use the technology - a video programme, for example, that shows how video may be used. It is also important for practitioners to have hands-on experience of using the technology as part of their training, a requirement which could preclude training at a distance.

Some training strategies are more suitable than others for particular institutional contexts. Full-time academic staff, for example, need comprehensive training in course development and a range of strategies may be used. But an institution that uses part-time writers must find a different approach. Training is essential but must be brief, restricted to provision of clear guidelines and personal discussions. Preferably it is in two stages, with an initial briefing and a follow up. It must be conducted in such a way that any resistance to training is overcome.

New institutions also have special needs. Enough staff must be trained quickly to help the institution become fully functional as fast as possible. Workshops and fellowships are particularly important in this context. Longer training courses, particularly where trainees go away to study, are more appropriate for staff of well-established institutions. Programmes leading to qualifications may help where there is a problem of staff retention.

One training strategy need not exclude another. If administrators attend a training workshop, there is no reason why they should not also take up a study fellowship. In fact, comprehensive training needs to employ a number of strategies. For example, senior managers might attend a seminar presenting an overview of distance education. Further training is then probably best provided by structured visits and study packages and, on selected themes, regional workshops. Some people may be expected to enrol in degree programmes, including programmes taught at a distance.

Middle management also require the overview of distance education. In addition, they require hands on training for the application of management of their special areas to the needs of distance education. Suggested modes of study are attachments, specialised workshops, and access to degree course study modules. In-house training may also be appropriate.

Once again, we find the idea of a sequence of training activities stressed.

Training should not only be comprehensive, it should also be continuous, particularly for those with a long-term commitment to distance education.

One training strategy may be used for several purposes. In the case of training materials, if these are designed as series of free-standing modules, each module may be used in a variety of settings for a number of purposes. Self-instructional texts, for example, may be used in a workshop or as part of a distance learning course. Some materials may also be used as sources of information. Packages designed to provide staff with basic orientation about distance education may also, for example, be used to provide information to national policy makers.

Workshops may also have more than one purpose. Media specialists, for example, need to adapt to the new environment of distance education. A good
way to sensitise them to the issues is for them to attend the same training workshops as course designers. In addition, they might benefit from one-day specialist workshops, half on educational issues and half on technical ones. There is a further reason for encouraging multi-purpose workshops, particularly within a single institution: people involved in developing courses need to work as a team and need to be familiar with the whole process of course development.

CONSTRAINTS ON TRAINING

The Round Table began with the intention to examine the efficacy of various types and levels of training. But one of the barriers to more effective training is lack of information. Several participants brought to the workshops examples and information about training opportunities, but the range was not comprehensive and time was insufficient to examine the material in detail. COL has now begun work on this as a priority.

The Round Table instead focused on a different but related question. What impedes training? Is training so important, why is there not more taking place? The workshop participants offered explanations from experience.

Barriers to Training: the View from the Field

The University of Lagos – E O Fagbamiye

Our problems centre around funding for both full and part-time staff. In the case of full-time staff we would need to send them outside Nigeria or bring trainers from outside. Either way hard currency is involved and this is very hard to come by in this country right now. In the case of part-time staff, we run course-text writing workshops from time to time. The main problem has to do with funding since we find lecturers who wrote course-texts more productive when we are able to move them away from their usual base for a few days at a time. Hotel bills are now extremely high in this country so we cannot afford to hold course-text writing workshops more often.

The University of the South Pacific – Claire Matthewson*

Professional development needs, traditionally met off the job, are addressed by the University’s established Study and Training Leave provisions. These, in theory, allow staff to pursue approved research and training opportunities at overseas institutions. In practice, however, release for such pursuits often cannot occur because of practical considerations. High cost is significant among these, over and above that of staffing resources. Also significant among these is the difficulty which the University of Papua New Guinea and the University of the South Pacific share: high staff turnover, both academic and administrative, and both national and expatriate.

The University of Papua New Guinea – Howard Van Trease

In designing a training programme for the Department, it must be kept in mind that both academic and administrative staff do not, for the most part, see themselves as limited only to the field of distance education. Academics aspire to advance in their own academic fields and often expect to return to conventional face-to-face teaching positions. The Department’s administrative staff are seen by the University as simply being part of the overall administrative structure and thus likely to be transferred to other sections as required. Indeed,

* USP was unable to send a delegate to the Round Table, and was represented by Howard Van Trease of UPNG. A short paper was however submitted by Claire Matthewson of USP.
although Extension Studies has its own administrators, the scope for career advancement within the Department is limited because of the small number of positions. Any good administrator, therefore, aspires to a more senior position within the greater University, which necessitates moving out of the Department.

Any training programme, therefore, must cater for a regular turnover of staff, both academic and administrative national and expatriate. The recruitment and training of qualified national academics is going to remain a problem for the foreseeable future and thus the Department will continue to be dependent on expatriates and experience a regular turnover of staff. Moreover, as noted above, most foreign academics recruited into the Department also require training in the production and use of distance teaching materials, thus a programme of staff development must be available locally and on an on-going basis as well.

The University of Nairobi – Ben Gitau

Even when funds are available, it has not been possible to establish a training institution and often we have to resort to sending staff overseas at great cost and inconvenience to the institution. The courses undertaken overseas are not always relevant to the institution, or compatible with the needs of the country. In-country training programmes also have their own problems. Such problems include the problems of time available to the writers and editors. Training in distance education is not considered a priority. There is no training programme for trainers. Trainers have picked up their skills from the job. Few have had training from overseas. The main training needs of the trainers is at the degree level, mostly post-graduate training.

Overcoming the Constraints

The constraints fall into two categories: those that are internal to an institution, and those that originate from outside, at national or international level. The former are largely subject to control within the institution, while the latter need external action to be overcome.

Institutions report insufficient funds for training, even if it is to be conducted in-house; they note that staff cannot be released for training due to staff shortages; they also note limited in-house training capacity – a shortage of trainers and lack of local resource materials.

While many institutions are genuinely short of resources, this is not the only reason training does not occur. Resources could often be found if managers were fully committed to the idea. The leadership needs to be convinced of the value of staff training and to allocate to it a sufficient share of existing resources. Without training, a vicious circle can develop, where staff are unsure of what they are to do, feel undervalued and move to new posts; managers then have difficulty in finding good, committed replacements.

Another difficulty arises when staff do not see the need for training and are reluctant to take seriously any opportunities that are offered. It can be difficult for highly experienced professionals to accept that in order to work effectively in distance education, they need to acquire new skills. The commitment of top management can again be crucial; when a Vice Chancellor opens a workshop for part-time course writers, participants are likely to take it seriously.

Constraints at national level are also largely to do with resources and also vary following the views of senior policy makers. But committed officials cannot remove completely all constraints. If local distance teaching institutions have staff who need training and there are no local trainers, then it is necessary to
look outside – to send staff overseas for training, to bring in foreign trainers, to enrol local potential trainers on training courses taught at a distance and examined elsewhere.

All these are reasonable options, but there is a major drawback: they are all costly, especially for developing countries. For small numbers, those who are to be trainers, funds may be available from international sources. New institutions may also attract support from similar sources. But for training the regular staff of established institutions, where are the funds for foreign courses or international consultants?

A way forward begins to appear if we examine the constraints from an international perspective. Institutions report that they lack information about those training opportunities that are available internationally. They need to know what materials are available, what courses are offered, and who the experts are, who can be called on as consultants. They are constrained by lack of information. Once they know what is available, managers can more easily obtain suitable training materials, identify consultants from neighbouring countries, arrange training on a regional basis and plan ahead for advanced training for the trainers.

COL is committed to encouraging collaboration in distance education. Its role in training begins to emerge from this analysis. Effective training on a national level needs local commitment and resources, and also international support through information, assistance in obtaining resources and help in establishing regional and international networks for training. Such tasks are firmly in accord with the mandate of COL.

THE ROLE OF THE COMMONWEALTH OF LEARNING

COL’s role is to act as a facilitator, providing active support where possible. Following the recommendations of the Round Table, COL expects to:
- organise, or assist other agencies to organise, training workshops on a regional or sub-regional basis;
- collect and evaluate existing training materials, and make such materials available;
- commission training materials to support institutionally based workshops;
- commission case studies of planning and administration;
- develop a register of experts who can assist with training; and
- build up regional pools of expertise by identifying experts and training them as trainers.

The Round Table has been of immediate value in helping to develop an action plan. The focus over the next three years will be on the development of in-country trainers in Commonwealth countries. COL will work on training in the six areas defined as priorities:
- basic orientation to distance education
- planning, management and administration
- instructional design and course development, including course adaptation
- use of technology, including computers
- research and evaluation
- student support services
COL intends to work with Commonwealth partners to develop training opportunities using the four strategies of workshop, materials, fellowships and special training institutions. Specifically:

1. COL is developing regional training plans, a central feature of which is a series of regional workshops to train key personnel and trainers in each of the six categories above, as the need arises, over a three year period. Four such workshops are expected to take place before the end of 1990 for Southern Africa, the Pacific countries, the Caribbean and South Asia. COL intends to develop strategies to support those who have attended such workshops to use their training to the benefit of their institutions.

2. COL will conduct and publish a survey of materials and courses for training distance educators in the immediate future. It will also commission materials to fill gaps. A video on the use of technology is already commissioned.

3. COL will help institutions plan staff development programmes which incorporate in-house training, workshops and fellowships; and to develop links between institutions to allow exchange of personnel for training fellowships.

4. COL will encourage and support the development of regional and national institutions and units for training distance educators. A staff training college for distance education is being planned for India. This may act as a model for regional or national application elsewhere.

5. COL will develop a register of trainers, as part of its information service. This will be constantly updated.

6. COL will from time to time publish reports and case studies which are of critical value as resource material for trainers. All over the world, in both developed and developing countries, distance education is going to play an important role. The ultimate goal of training is to develop local capacities with a view to improving the performance of distance education.
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