

OPEN AND DISTANCE LEARNING: FROM A SECOND CLASS ALTERNATIVE TO STIMULATING NEW EDUCATIONAL STRATEGIES?

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Workshop Paper, leading to discussion

Most governments are trying to improve and expand their education systems, but unfortunately against rising costs, constrained public expenditure and now a slowing of the world's economy. Many, particularly those in poorer countries, face increasing financial difficulties in providing traditional classroom teaching for all who need it, and consequently are turning to 'distance learning' as a more affordable alternative. This offers considerable potential for the acquisition of knowledge in a skill hungry world. However if this is to be maximised the relationship between, and the closer integration of, institutional and distance learning need careful scrutiny. The Pan Commonwealth Forum offers a timely opportunity to initiate such thinking and discussion and this workshop paper attempts to develop this theme for consideration.

The Components and Contexts of Learning

All countries have educational traditions and institutions. However as countries have become increasingly interdependent a world view of education has begun to consolidate, arguably crystallizing the key components of learning as:

- a curriculum;
- an assessment /examination/qualification system;
- face to face teaching, tutorial support and supervision;
- access to materials, equipment, information and ideas;
- peer group discussion and co-operation;
- a well equipped institutional base.

Some, or all of these components, can be brought together to meet an educational purpose, but the contexts in which they arise differ markedly, particularly in terms of resource availability and finance. It is therefore important to design the utilisation of the components of learning to meet each purpose in context.

The Prevailing Tradition

In the wake of industrialisation, Western nations established mass elementary education based on teaching in classrooms, eventually leading through competitive examinations to selective secondary schools and elite universities. The curriculum was largely academic and the examination process narrow but, most importantly, the qualifications offered were seen increasingly to determine employability and social mobility.

This is the model of education, differentiated at primary, secondary and tertiary levels, that parents and students across the world have come to perceive as 'first class' education and it is the model, which, with varying degrees of success, governments have been trying to develop and expand throughout much of this century

Distance Learning

The context in which distance learning developed is that outlined above. Although it has a number of origins, distance learning has developed on the principle that education, based on the provision of materials and limited media contact with a teacher, can be delivered to the student at his or her choice of location. In its early forms, almost entirely based on correspondence, usually on a commercial basis, it mainly provided an avenue for those unable to enter secondary schools and universities.

Distance learning therefore developed as a subsidiary, *external* to the institutional system, but following its curricula. It offered a second chance, for those unable to afford or gain selection to the secondary and higher educational institutions. But it was generally perceived as second choice and second class and tended to appeal only to committed students who were sufficiently motivated and resourceful to study on their own. However it has proved particularly useful in several 'developing countries' where institutional provision has remained very limited..

Attempts to improve on correspondence education, to utilise new media, to be more sensitive to learner needs, have come from several quarters. But these initiatives have required greater resources and have developed relatively slowly. It now appears that this concept of distance learning is being overtaken by the concept of open learning.

Open Learning

The relationship between the concepts of distance learning and open learning and their use needs clarification. Open learning can perhaps be interpreted as a new phase or a continuation of distance learning, but there is a very important distinction.

Whereas distance education began with method, open learning, as the phrase suggests, began with a purpose: to develop new strategies to provide access, *at an affordable cost*, for *all* who seek the benefits of higher levels of education and training, irrespective of the prevailing institutional system.

Therefore although open learning shares origins with distance learning, its leading agencies are now engaged in radical, diverse innovation: redesigning and reorganising the components of learning, utilising the increasing power and range of the new information and communication technologies (ICT) to meet the needs and circumstances of those who cannot or do not wish to enter traditional education institutions. Open learning utilises and extends the methods of distance learning, but also, where affordable, utilises the methods of institution based learning as well, to widen the range and scope of educational provision as a whole and to make it more *inclusive*.

In doing this it has opened new frontiers of educational development covering a range of areas including:

- better sequenced, more clearly presented and attractive course designs;
- course related examinations with wider ranging forms of assessment;
- more user friendly learning materials;
- the utilisation of new media and expanding information technology;
- the planning and organisation of localised support, for example, tutorials, discussion groups.

The success of the leading edge open learning institutions in achieving these developments is well recognised. Utilising the rapidly developing capacity of ICT they herald new educational horizons.

Yet alongside these initiatives have been continuing efforts to increase traditional, institution based education. It is clear now that even the wealthiest countries cannot continue with strategies of educational expansion based on one prevailing model. The poorer countries, confronted not only with the severe financial problems that expansion entails, also have to contend with the increasingly apparent failure of the traditional model to meet their educational needs particularly beyond the basic

primary level. Consequently the possibilities now being suggested by open learning are being welcomed by all countries.

What are these possibilities? What are the dimensions in which open learning might develop?

- a) a more cost effective and attractive alternative to traditional, institution based learning for those who cannot afford fees or 'cost sharing' and for whom governments cannot provide? If so, how does it overcome the 'second class' label and how does it encourage inclusion rather than separation?
- b) a new popular approach to learning, with 'mega' educational production organisations able to deliver cost effective education, via the latest technology, to all households and workplaces? If so, how will this emerging approach relate to current practices and controls and take account of the needs and contexts of different countries and localities, particularly the availability and use of ICT?
- c) a search for new educational strategies which aim to be open and inclusive that:
 - recognise the importance of all the components of learning and the need to improve them;
 - seek new and better ways of *combining* these components in appropriate forms to meet the needs and circumstances of differing localities throughout the world.
 - put longstanding traditions and new learning strategies into a context of change, bringing together the strengths both offer into new more flexible frameworks which provide for the effective localisation of learning.

Local learning?

All three present significant possibilities, and there are no doubt more to be identified. The theme for discussion in this paper is that the third dimension indicated above is now urgently needed. Open learning can open the way to strategies that will finally enable distance learning to become *local learning* for all who can and seek to benefit.

Such strategies, it seems, will need to include:

- designing ways to combine the benefits of distance /open learning and institution based learning within one common framework. Surely it makes better sense to consider the benefits of integration than leaving connections between parallel systems to chance?
- reviewing resource availability and affordable access to the components of learning in different types of location carefully and imaginatively, and tailoring the optimum development of educational provision accordingly;
- taking note of what others are achieving and proposing across the world and where possible sharing and cooperating to mutual benefit

However there is a cautionary note. Open learning, and the new technologies it embraces, are developing so rapidly and extensively in the wealthier nations that care must be taken to ensure that poorer nations, and poorer communities worldwide are given full consideration. A key question must be: how can the prospects held out by distance /open / local learning and the expanded use of ICT enable poorer nations and communities to 'catch up'. They must not be left dependent on models that do not suit their needs or pockets again.

The following section examines a number of strategies with regard to utilising open learning, at primary, secondary and tertiary levels, and invites comments and discussion as to the feasibility of these ideas, and how they, if acceptable, might be taken further.

Strategies

Primary Level

The Jomtien Conference helped to establish a world wide concern, that as a priority, all children should have the opportunity to learn in school for a period of basic/primary education. It was agreed that it was in the interests of every country to secure such education for its children

Strategies, derived from open learning, at this level focus on supporting improvements to institutional schooling. They can be summarised as:

- (i) providing for school improvement through:
 - teacher training and development;
 - improved courses and materials design;
 - improved use of ICT.
- (ii) providing programmes, until school facilities are available, for those unable to attend school.

Is there scope for these, or other strategies, to be developed further?

Secondary Level

At the secondary level matters are more complex, and the situation may be summarised as:

- (i) the growing needs/demands for secondary education in many countries;
- (ii) the varying structures of secondary education, which are governed by the length and focus of primary education. Some countries perceive basic education as encompassing the early years of secondary education, often dividing secondary education into lower and upper levels, with a selective examination at the end of the lower level;
- (iii) the varied forms of secondary schooling, which may include high cost and low cost schools within the formal system, and 'evening schools' or distance education centres operating alongside the existing formal model.

New strategies are therefore needed in three respects:

- to support the improvement of established schools;
- to develop effective open learning alternatives;
- to seek integration and mutual support between the models of traditional institutional learning and open learning.

The first is fairly straightforward and follows the pattern indicated above for primary schools, with a clear emphasis on teacher education. The second turns on the nature and age of students, the way programmes are to be delivered, and the extent to which resources are realistically available: communication media, learning centres, part time tutors. The question to be raised here is, can courses be designed, with open learning techniques, particularly high quality open learning curricula, materials, and examinations, which all may use? The third goes much further, but turns on a central question. Can the curriculum and methodology of school based learning and open learning be designed together, with the aim of mutual benefit?

The better designed open learning courses and examinations include detailed support for teachers as well as students. Some views suggests that well qualified and experienced teachers may find such courses too restrictive, but surely their skills and experience enable them to adapt, just as any well qualified and experienced teacher adapts a traditionally constructed curriculum to meet student needs. Less qualified and experienced teachers on the other hand are likely to find such 'scaffolding' very supportive. All teachers would then build up familiarity with open learning courses, and students would learn to work more readily on their own. This approach could enable schools to link with alternative schemes, to provide teaching and tutorials to support the use of materials by local students following an open learning programme outside the 'traditional' system.

Is such a strategy realistic? Will it offend the purists who reside on both sides of the track, or could it lead to benefits, maximising local co-operation in order to support all local students?

Tertiary Level

The older students become, the more able they should be to support their own learning. Universities base the research responsibilities they place on their staff on this assumption. It is therefore at the post 16, further education, college, and university level that open learning seems to have the most significant implications for educational change.

This is fortunate because the underlying problem with tertiary education is the elite higher education model that most Commonwealth countries inherited from England. Although it is very efficient, and enjoys academic research prestige, it is expensive, hierarchical, and defends itself with a narrow academic 'gold standard,' which until recently has had relatively little to do with national economic development. At this level therefore, new strategies are needed, not to support the traditional model, but to enable it to become more flexible and diverse to:

- (i) cope with expanding numbers on a reducing per capita income;
- (ii) meet the demand for more varied programmes of study;
- (iii) serve the needs of students with more diverse educational backgrounds and talents;
- (iv) relate more effectively to life and career long learning on a part time, rather than a full time basis;
- (v) provide a higher educational service for all areas and communities in a country, not just the traditionally privileged urban centres.

Arguably the constraints on innovation in higher education turn less on resources and more on opinion and a willingness to change, than those of the other sectors. As governments move their spending to basic/primary and secondary education, the questions asked tentatively about secondary level's use of open learning strategies can be taken further at the tertiary level. Can traditional and open learning at this level be designed and developed together within a common framework? Such an approach could avoid the pressure for uniformity and allow for a much wider variety of institutions, some offering institution based learning, some open learning, some both. Credit accumulation and transferability allow students to experience both institutional and open learning, and build them into a customised plan to meet personal and societal needs. Could such an approach also mesh with industrial and commercially based training and open the way to linking vocational/technical education more closely to employment market needs?

The better open learning courses and materials are designed, the fewer pressures bear on lecturers' time, and this time can then be used to specialise, for some in remedial techniques where needed, others in research and developing associated materials to enrich their teaching. With the remarkable achievements of the current open universities to draw on and the growing availability of ICT, surely this is a world wide challenge which must now be given increasing attention?

There are however constraints. In the face of reducing per capita income, the traditional institutions are revealing two tendencies. On the one hand they emphasise past prestige which has such an influence on social mobility, on the other there is a tendency to be opportunistic. Many universities and colleges are currently setting up distance learning divisions, often as commercial sidelines, without the expertise or resources to offer quality open learning. In so doing they perpetuate the perception of distance/open learning as second class. Free standing open universities, in response, have therefore to emphasise their distinctive separate identity, both to protect the methodology they are establishing and their own commercial viability.

The potential which the new technologies have is increasingly clear, but developing this potential fully, requires finding resources beyond the scope of most universities, on an individual basis. Is a new order of higher educational provision now needed including greater diversification, the expansion of open learning and greater cooperation between institutions with differing specialisms?

Adult/Non Formal Education

Like distance learning, non formal education was developed as an alternative to institutional (formal) education. It tended to incorporate adult education, as it was designed for those excluded from formal education at all age levels. It has longstanding origins, but in effect generally aims to address the immediate realities of life for those with little or no schooling: basic numeracy and literacy, life skills, including basic agriculture, health/hygiene, and the development of skills which might lead to local or self employment. In this respect it diverges from the formal system in terms of curriculum rather than method, and does not normally offer access to qualifications which lead to social mobility, or to mainstream education.

Although non formal education is now given a much stronger empowerment focus, it still by definition remains outside the formal system, is regarded as second choice and second class, and is often even administered by other government sectors, such as community development or social welfare, rather than education.

Open learning techniques can and do enhance non formal education, but does not the strategic thinking and pressure for inclusiveness discussed above, offer a vital opportunity to address the nature of the division between formal and non formal education that has for so long plagued education designed to improve the quality of life of the dispossessed? .

Teacher Education: Training and Development

It is interesting that distance/open learning methods are probably having their greatest impact in the localisation of teacher training and development for traditional schools. Urgent pressures, to make savings in time and money and focus more directly on school improvement, are increasingly making initial training and further development in most countries partly or entirely school based, often supported with materials through distance/open learning channels.

It is happening at three levels:

- (i) to provide training for the large numbers of unqualified or under qualified teachers who are required in many countries and must therefore qualify whilst they teach;
- (ii) to provide a more practice oriented approach for initial/pre- qualification training, where trainees spend a much longer period of their training in schools, developing the practical skills of teaching;
- (iii) to establish more regular continuing professional development for qualified teachers, with the need to relate this to ongoing school improvement as well as longer term capacity building.

Appropriate programmes are required for each category and a wide range of exploration and innovation is now developing across the world. But one common factor is already becoming clear: the benefits of utilising the key components of learning imaginatively and flexibly in the context of local resources and needs. Clear curricula and assessment procedures, well prepared materials, tutorial support, the supervision of practice, and peer group discussion, all have to be delivered to teachers at their schools, or within easy reach.

Is it now possible to envisage a framework within which the benefits of institutional and open learning can be used to configure combinations of the components of learning to meet the varying conditions which prevail in diverse locations. Are the issues becoming sufficiently clear in the field of teacher training and development so that the 'old' institutional arm and the 'new' open learning arm can come together to develop optimal provision location by location? The Commonwealth of Learning and the new distance leaning unit at the World Bank are giving the lead. How can the necessary strategic cooperation between teacher training institutions, open learning agencies and schools be successfully developed to provide for a new quality of teaching on a cost effective basis? If teacher training and development can get this right, then it will have a double benefit, for it will not only help to meet the educational problems indicated above, it will also give teachers direct experience of the wider processes of learning and the advantages in utilising them all within one inclusive system.

Looking Ahead

If new strategies are to be developed then a wide range of initiatives will be needed which go beyond the scope of this paper. They will need to address many questions, including:

Co-operation and Partnership

Strategies to improve and expand education point countries to new frontiers and hence joint exploration. There are achievements and expertise in all countries and it is now important to develop prospects on a genuinely co-operative basis across the full spectrum of nations and communities

Ownership

At all levels individual, institutional, national, there is a concern for ownership and self determination. Strategies for change, particularly when ideas, technology and resources come from others are unsettling. For effective co-operation, partners must be secure in their sense of ownership, but ownership must not slip into defensiveness, particularly of the status quo or the inadequate.

Quality

Education is increasingly subject to quality assurance, but the current conventions are based largely on traditional institutional experience. Open learning has clear advantages, particularly in the transparency of its courses and materials, but it also has disadvantages. For instance the time required and funds needed to re-design good quality courses and materials can be frustrating to governments desiring urgent solutions. Speeding up processes and accepting cheaper production methods lead to poor courses and disappointing success rates. Strategies to utilise distance/open learning require appropriate measures of quality.

Organisation and management

The growing emphasis on educational management has tended to focus on traditional institutions. New, wider ranging arrangements designed to establish configurations of the components of learning shaped to the needs and resources of different learning locations will raise different management issues and require imagination and flexibility. Efficiency will have to be balanced with inventiveness.

Resources

Current public sector financial thinking leaves little room for the research, development and start-up costs that radical strategy development involves. Yet national education budgets can no longer afford to expand the traditional institutional model to meet growing demand at all levels. Fortunately the World Bank has recognised this growing impasse and is offering exploratory loans. It is to be hoped that other funding agencies will follow this lead.

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Appendix

Developments which link distance/open learning and institutional learning are now growing. There are lessons to be learned from such initiatives, three examples are cited briefly below.

1. **Mozambique** has taken a number of initiatives to support teacher training:
 - developing new colleges;
 - revitalizing ZIP (Zone Influencia Pedagogica) programmes by clustering schools to support each other, as was the pattern during the fight for freedom;
 - establishing IAP (Institute de Aperfeiconmento de Profissionais) to upgrade teachers. Programmes are based on correspondence materials from Brazil modified to suit local needs.

These national initiatives have been developed to mesh with a range of projects at provincial level, supported by aid agencies. An example is the OSUWELA (knowledge) project, developed by the Nampula Provincial Education Department and the Netherlands Government. Training and support for teachers are planned, delivered and evaluated in schools, alongside the teachers' normal teaching programme, through a network, which includes Provincial and District Advisors, ZIPs, the Teacher Training College, the IAP programme and the schools themselves. By planning together, and supporting teachers with materials, local mentors, discussion groups and workshops, the result is a system which enables teachers to improve themselves, and their pupils.

2. **Belize** has redesigned its initial teacher training into two levels. Level One provides a basic qualification, largely through distance learning. Trainee teachers in post follow locally designed courses, supported by supervision, tutorials, both in school and district education/resource centres. Vacations provide opportunity for college based programmes. Level Two provides for professional advancement, largely through a shortened college based course, and this in turn is followed by a growing professional development programme, again using a combination of methods of delivery.

3. **Tanzania, Malawi, Botswana, Zimbabwe, Namibia and South Africa**, have combined, through the initiative of COL, to develop a project to improve science and mathematics teaching for primary and lower secondary schools. This involves distance learning, with supervision and support through local institutions: colleges, centres and schools. An initial design was accepted at a meeting of Ministers early in 1998 and developments have followed rapidly, leading to the establishment of a Steering Group reporting to each Ministry, and centres being established in each country. Further developments and initial training for those responsible for delivering programmes, are being developed with the support of the OU, UK.