TOPIC 1

Introduction to Open and Distance Learning

1. Overview

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

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

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

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

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

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

1.1 Source materials for this topic

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

Keegan, D. *The foundations of distance education.* London: Croom Helm, 1996.

Keegan, D. (ed.) *Theoretical principles of distance education*. London: Routledge, 1993.

Koul, B.N., and J. Jenkins (eds.) *Distance education: a spectrum of case studies*. London: Kogan Page, 1993.

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

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

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

Sparkes, J. The problem of creating a discipline of distance education. *Distance Education*, 4:2, pp. 179–86, 1983.

2. The concept of open and distance learning

2.1 Definitions

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

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

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

2.2 Distinguishing the types of open and distance learning

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

Correspondence education, home study, and independent study

These distance learning methods are:

- well over a century old;
- based on stand-alone, self-study materials. Learners do not have to leave their homes to study; and

- often print-based with communication through postal services or telephone. They can, however, use a variety of means for tutor–learner contact, including the postal system, telephone, electronic mail, television and radio broadcasts, and video and audio cassettes.

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

External studies

The term *external studies*:

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

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

Continuing education

The term *continuing education*:

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

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

Distance teaching

The term *distance teaching*:

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

Self-instruction

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

- materials take learners step-by-step through an instructional process;
- self-assessment exercises are a central feature; and

- instruction can be paper-based or computer-based.

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

Adult education

The term *adult education*:

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

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

Technology-based or mediated education

The term *technology-based education*:

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

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

Learner-centred education

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

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

Open learning

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

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

> *Example*: Many institutions use the term *open* in their names. See the case studies for:
>
> Open Access College and the Open Learning Institute of Charles Sturt University, both in Australia;
>
> Open Learning Information Network in Canada;
>
> Indira Gandhi National Open University in India;
>
> Open University of the University of the Philippines; and
>
> Open University of Sri Lanka.

Open access

The term *open access* implies a lack of:

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

Flexible learning

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

- convergence of open and distance learning methods, media, and classroom strategies;
- learner-centred philosophy;
- recognition of diversity in learning styles and learners' needs;
- recognition of the importance of equity in curriculum and pedagogy;
- use of a variety of learning resources and media; and
- fostering of lifelong learning habits and skills in learners and staff.

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

Distributed learning

The term *distributed learning*:

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

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

2.3 Time and place continuum

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

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

Scenarios for Open and Distance Learning

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

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

   > *Example*: See the case study for the Open Learning Institute, Charles Sturt University in Australia, for an example of an institution that relies on residential schools to provide interaction between learners and tutors is being challenged.
   >
   > The case study for the University of Nairobi describes a programme that is implementing more residential schools, to replace its tutorials.

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

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

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

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

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

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

3. Open and distance learning systems

3.1 Advantages of open and distance learning

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

Overcoming physical distance

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

- learners in remote locations who are unable or unwilling to physically attend a campus; and
- learners and teachers geographically separated in that teachers in urban settings instruct learners in rural settings.

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

Solving time or scheduling problems

Open and distance learning can solve time or scheduling for:

- client groups unwilling or unable to assemble together frequently;

- learners engaged in full-time or part-time work, both waged and volunteer; and
- family and community commitments.

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

Expanding the limited number of places available

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

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

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

Accommodating low or dispersed enrolments

Open and distance learning can accommodate:

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

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

Making best use of the limited number of teachers available

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

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

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

Dealing with cultural, religious, and political considerations

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

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

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

3.2 A systems approach to open and distance learning

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

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

analyse ® design ® develop ® implement ® evaluate ® revise

Analysis: a detailed examination of all facets of the problem

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

Output from the analysis phase:

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

Design: requires the preparation of a detailed solution

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

Output from the design phase:

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

Development: must address the following kinds of questions

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

Output from the development phase:

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

Implementation: putting the solution into practice

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

Output from the implementation phase:

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

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

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

Output from the evaluation phase:

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

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

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

Output from the revision phase:

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

3.3 Functions of open and distance learning

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

Obtaining and managing money and other resources

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

Developing or acquiring programmes and courses

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

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

Recruiting and promoting

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

Physically producing, reproducing, storing, and disseminating materials

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

Enrolling and registering

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

Delivering programmes and courses

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

Providing learner support

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

Examining, crediting, and granting credentials

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

Evaluating and revising processes, procedures, programmes, and courses

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

Training and developing staff

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

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

3.4 Kinds of open and distance learning

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

Single mode institution

- set up to offer programmes of study at a distance;
- some face-to-face interaction involved, but often optional;
- teaching and learning process 'mediated' in some way

  by print, including correspondence;

  by audio, including radio (one-way, two-way), cassettes, telephone, or audio conferences;

  by video, including television (one-way, two-way), cassettes, or video conferences; and

  by computer, including computer-based training, e-mail, computer conferencing, or World Wide Web;

- characterises many of the world's 'mega-universities', including Indira Gandhi National Open University (IGNOU), Universitas Terbuka, Sukhothai Thammathirat Open University (STOU), and United Kingdom Open University (UKOU).

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

Dual mode institution

- offers two modes:

  one using traditional classroom-based methods; and

  one using distance methods;

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

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

Mixed mode institution

- offers learners a wide choice of modes of study

  independent, group-based, or some combination; and

  face-to-face, mediated, or some combination;

- maximises flexibility of place and pace of study;
- the result of 'convergence' of face-to-face and distance modes; and
- increasingly characterises organisations that were once 'single mode' or 'dual mode'.

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

4. Practice exercises

4.1 Categorising various institutions

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

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

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

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

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

4.2 Application to home institutions

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

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

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

Materials: Paper and pen or pencil for each participant.