Flexible Pedagogy, Flexible Practice

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Edited by Elizabeth Burge, Chère Campbell Gibson, and Terry Gibson

# Flexible Pedagogy, Flexible Practice
## *Notes from the Trenches of Distance Education*

Edited by
ELIZABETH BURGE, CHÈRE CAMPBELL GIBSON,
AND TERRY GIBSON

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# Foreword

In 2009, UNESCO estimated that there were 150 million post-secondary learners in the world, with 20 million enrolled in "open" universities—that ultimate expression of flexible learning. UNESCO further estimated that in order to reach a reasonable number of learners around the globe, another 150 million places would be required in the next decade, largely in Asia, Africa, and Latin America. This will mean a true revolution in the global learning map. It is clear that such a goal will only be achieved through an aggressive implementation of flexible learning. Indeed, such a revolution will have to redefine the term *flexible*, which, while radical in its day, is too timid for a future of learning abundance. What advocates of flexible learning are attempting to do is to turn knowledge from a commodity of scarcity into one of abundance. The journey will be difficult, and it will revolutionize the world we know. And, as with any revolution, there will be considerable resistance.

It would be enormously instructive for UNESCO officials and world post-secondary leaders to reflect carefully on the essays in this volume, which acknowledge that the world-transforming task will not be easy. Colin Latchem and Insung Jung, for example, outline with some despair the barriers that Asian societies will have to overcome, or at least recognize, if they are going to increase post-secondary participation. They clearly outline the cultural features of some Asian communities that will make change difficult. For example, in those countries where the Confucian model of learning predominates and teacher-led instruction is considered "quality," the massification of learning without an accompanying increase in faculty will likely preclude real change. At the same time, as the authors point out, in societies such as Korea, where there is a questioning of the norm, change is happening at an extraordinary pace. Their essay, along with those by Mary Simpson and Bill Anderson on New Zealand and by Milly Daweti and Jean Mitchell on South Africa, provide interesting juxtapositions. It is clear that global change can only be realized locally and will be uneven. Yet those countries that can sort out the

cultural, political, economic, and institutional realities of flexible learning will be the leaders in the new knowledge economies.

What also becomes clear in the essays by, for example, Darcy Hardy ("Before the Fall: Breaking Rules and Changing Minds") and Andrew Higgins and Mark Northover ("Implementing an Online System: Voices of Experience") is that resistance, whether covert or open, continues on the part of both traditional institutions and faculty members within all institutions. A number of essays suggest responses to this resistance. The collegial environment within post-secondary learning dictates that no radical change will occur rapidly, and perhaps this is appropriate. As Yoni Ryan points out, we need the patience of Job. However, it is also clear that those who can manage the "right" change rapidly and publicly will be the winners in determining the course of post-secondary learning for many in the next generation, particularly in Asia, Africa, and Latin America.

Unfortunately, as Terry Evans and Peter Smith note in "The Fog of Flexibility," flexible learning in the 1980s became the hallmark of the conservative agenda, which sought to transform education from a social right into a marketplace commodity. In some traditional residential universities, there was a persistent belief that flexible learning was cheaper and could be turned into a revenue opportunity to support the more valid residential experience. Greville Rumble's "Flexing Costs and Reflecting on Methods" brings some focus to the costing debate. Perhaps the early reluctance to understand or reveal the true costs of the best of flexible learning led to some of the first failures. However, a new ability to control costs has now pushed corporate-controlled learning back into the foreground. What remains clear is that "open universities" and the flexible-learning movement must seize the initiative again to ensure that flexible learning becomes the hallmark of the public movement to remove all barriers to learning—the barriers of time, geography, income, and ethnicity. The quest for equity should not become an opportunity for profit!

And progress is being made. Andy Lane deals with the potential of the open educational resources movement, which still holds more promise than accomplishment. Non Scantlebury and Gill Needham suggest how librarians can move flexible-learning agendas forward, perhaps more readily than teaching and research faculty might. Denise Kirkpatrick's essay on Web 2.0 is a brilliant reflection on this new technology, and

Ryan's plea that we examine and learn from the list of failures in the flexible learning closet full of skeletons is a particularly wise observation. Indeed, those of us who have been in the post-secondary environment for several decades are beginning to observe the resurrection of past failures ready for a repeat or perhaps, in some cases, for success.

What is obvious from all of the essays gathered in this book is that if the world is to achieve a level of post-secondary achievement such that all have the potential of participating in the new knowledge economies, both an examination and a reform of the post-secondary value chain—indeed, a revolution—are a must. *Flexible Pedagogy, Flexible Practice* will prod us all into rethinking how we might learn and how we manage post-secondary learning institutions. If humankind is to reach its potential within one or even two decades, there must be change—and that change will be rooted in flexible learning options.

Frits Pannekoek
President, Athabasca University
President, International Council for Open and Distance Education

# Introduction
## *Why Look at Flexibility?*

ELIZABETH BURGE

Dare we question an established canon of practice when it seems so self-evidently good? Yes indeed. The word *flexibility* and its adjective root, *flexible*, have gained such popularity in higher-education discourse and marketing strategies over the past few decades that it is time to dig into these words anew, with reflective and critical intent. Being our own discourse archaeologists should help us to unearth those less-visible and often taken-for-granted dynamics that help and hinder efforts toward flexibility, however we may define the term.

### FLEXIBILITY REMAINS A POPULAR TERM

Consider two marketing examples from two world leaders in flexible approaches to post-secondary education. The first is from a university based in the United Kingdom with approximately 250,000 registered undergraduate and postgraduate students around the world.

> Want to get a qualification that will help you develop or change your career? Learn a subject in depth? The Open University—voted top for student satisfaction for three years running—could provide the flexibility, the qualifications and the top-class teaching you're after. (http://www3.open.ac.uk/study/)

The second is from a university based in Canada, which boasts an annual enrolment of over 37,000 students across 87 countries. Hear Athabasca University explain to potential students one of its four guiding principles, that of flexibility:

> Once upon a time, you couldn't use the words university and flexible in the same sentence. Well that's not the case any more. AU is structured to fit the specific needs of your lifestyle. So it's education on your terms, not ours.
>
> There's no need to worry about an old-fashioned application deadline, and all the anxiety that comes with it. With monthly start times and Athabasca's continuous enrolment philosophy, you enter your area of study when you're ready.
>
> AU flexibility also means you can experience all the advantages of a traditional university in a non-traditional setting like your home, office, cabin or wherever you may find yourself.
>
> And once you get started, you can keep right on studying. More than 90 per cent of AU students study all year around. And there's no need to sacrifice your career for your education—81 per cent of AU students work while studying for their degrees. ("Viewbook 2010," p. 6, available for download at http://www2.athabascau.ca/prospective/)

Both institutions use the concept of flexibility to guide their operations and to enhance their deserved reputation. They recognize the need to adapt to changing student expectations, especially concerning return-on-study-investments, rapid communication, and career development.

Elsewhere, we also see attention to flexibility, defined in various ways but focusing basically on increased choice. The Higher Education Funding Council for England has evaluated eight pilot models of programming that feature prior-learning assessment, accelerated programs, and flexible teaching strategies (Higher Education Funding Council for England 2010). Earlier, the Council wanted to see e-learning technologies prompting, even "transforming," higher education toward "a more student-focused and flexible system" (Higher Education Funding Council of England 2005). The phrase *flexible learning* has appeared in many descriptions of course design and delivery and training practice across various disciplines and educational staff-development contexts (e.g., Hill 2006; Tait and Mills 1999; Weeks 2000). The Academic Search Premier database reveals many refereed articles about flexible-learning applications in formal and workplace learning contexts. Try an Internet search for "flexible higher education." Explore the Commonwealth of Learning

website (www.col.org) or scan the titles in The Open and Flexible Learning Series, from Routledge (www.routledgeeducation.com/books/series). Australia, another country well known for its distinguished history of innovative distance education, has a well-developed Flexible Learning Framework (www.flexiblelearning.net.au). An extensive inquiry into the "flexible provision of higher education" in non-metropolitan areas of Australia raised key issues and noted six common practical strategies to enable access, logistical convenience, and some accommodation to learning preferences of students (Ling et al. 2001). However, such flexibilities come with a price and some long-term impacts, as the researchers report and as some authors in this book echo. Finally, the Higher Education Academy in the UK released three reports in 2009 on changes needed for increasing workplace-based engagement in learning for career development. Such changes hinge on "greater flexibility" (www.heacademy.ac.uk/news/detail/2009/wbl_reports).

International post-secondary educators have recently signalled greater interest in flexibility. The June 2009 world conference of the International Council for Open and Distance Education, in association with the annual conference of the European Association of Distance Teaching Universities, focused on a very ambitious theme: "Flexible Education for All: Open—Global—Innovative." Here, the word *flexibility* was used to argue for significant change in educational institutions: "Society, the labour market, and individual as well as groups of learners require much more flexibility in their acquisition of (new) knowledge and competencies. This implies a major modernisation of the educational system that can build on our expertise and experience" (www.ou.nl/eCache/DEF/80/137.html). In the same year, the University of Hull, in the UK, used its annual teaching and learning conference to address the challenges regarding four aspects of "flexibility in higher education"—curriculum, delivery, people, and spaces. A year later, New Zealand distance educators titled their 2010 conference "Quality Connections, Boundless Possibilities—Through Open, Flexible and Distance Learning" (www.deanz.org.nz/home/index.php/deanz-conference-2010/2010-conference). With such popularity, one might easily assume that flexibility has reached the state of unassailable conceptual virtue, defying any critique at all.

First, we see an international niche for current and critical explorations, especially practice-based, contrarian, policy-related, and ethical assessments. Earlier critical analyses do exist (Chen 2003; Cloonan 2004; Edwards 1997; Evans 2000; Kirkpatrick 1997; Kirkpatrick and Jakupec 1999; Moran 1999; Moran and Myringer 1999; Nicoll 2006, 1997; Nunan 2000; Usher 2000; Willems 2005), but we want to update those analyses and include new explorers. As Cloonan (2004, 177) argued several years ago, an examination of the notion of flexibility "is somewhat overdue . . . and should encompass subjecting the concept of flexibility to the sort of scrutiny which it has hitherto largely escaped." Neither of the two principal handbooks on distance education (Evans, Haughey, and Murphy 2008; Moore 2007) contains, per se, overt and critical interrogation of the concept, other than Peter Smith's analysis in Evans, Haughey, and Murphy (2008). None of the major refereed journals in the distance-education field, to our knowledge, has recently run a themed issue to unearth the elements and dynamics of flexibility in practice.

A second reason for this book lies in particular aspects of our practice. Digital technologies offer increasing choices for learners in terms of when, where, and how they seek reputable programs and stimulating collegiality. Canada's leading news review magazine, for example, recently asked, "Who needs a prof?" as a journalist explained how she took flexibility into her own hands for university studies. Like at least one class colleague, she used Web 2.0 resources to escape the boredom and irrelevance of her traditional university course materials and find free and exciting course materials from Yale University via Academic Earth: "It's instant Ivy League for the masses" (Findlay 2010, 48). No surprise, then, that she used the Yale materials for all her graded assignments and exams. No surprise either that she questioned the value of paying course fees to the local university, which failed to meet her expectations.

How far institutional leaders develop and manage actual policies for teaching and learning choices is quite another issue. How often, for example, might we see "cottage industry" approaches that undermine effective flexible teaching across an institution? The "cottage" (office) often houses a teacher, increasingly a part-timer, who, after a brief introduction

to the latest course-management system, is essentially left to her/his own devices, struggling to manage the resulting extra workload. Fierce inter-institutional competition for enrolment calls for marketing discourses that appeal not only to learners' career aspirations but also to institutional skills in helping learners to manage the multiple demands on their resources. Governments still proclaim the need for flexible workers in adaptive workforces as a contribution to the development of national economies, and educators take notice of such thinking (e.g., Higher Education Funding Council of England 2010; Jakupec and Garrick 2000; Nicoll 2006). As Nunan (2000), Nicoll (2006), and authors in this book argue, the broad contexts of post-secondary education practice promote flexibility as a broad philosophy or as a practical change strategy, especially around teaching activity. But one point that Nunan made (2000, 50) remains relevant now as we see institutions trying to adapt to demographic and economic change: despite the intellectual challenges offered via the "multiple meanings" and "contested terms and concepts" around flexible learning, he argues, practitioners need to decide "whether to support or resist the changes that parade under the banner of flexibility."

One overarching question drives the making of this book: flexible learning is a canonical concept, much discussed and valued as an inherently "good" goal, but just how challenging is it on the rough terrains of practice? Or, as one colleague asked me, "How far does the rubber stretch?" Four subsidiary questions emerge: (1) Who or what is driving the flexibility agenda, and for whose benefit? (2) If the canon is still relevant for many institutions, how might we map its enabling and restraining forces in all their complexities? (3) Where are the compromises, the trade-offs? (4) How might we better problematize flexible-learning discourses as they are used in post-secondary formal education contexts? You will find some answers from seasoned professionals as you read on.

Our final reason for making this book is that we wanted to present relatively frank reflections from a wide range of very experienced international colleagues. Being both frank and reflective is not always easy, so we appreciate the authors being willing to take some risks. Like the earlier, pioneer generation of distance-mode educators, our writers have faced down very challenging dynamics and attitudes.

Before summarizing a few approaches to defining flexibility and outlining the book's structure, I would like to acknowledge some key heritage thinkers.

## HERITAGE KNOWLEDGE AS INSPIRATION

Charles (Chuck) Wedemeyer was an American icon of distance education. He pioneered the key principles of flexible learning (1981), as Chère Campbell Gibson, who knew Chuck well, explains:

> He felt passionately about these independent, self-directed learners and believed learners should be able to set their own goals; work at their own pace; and at times convenient to the ebb and flow of their busy lives, to exercise a high degree of autonomy as well as self-assessment of outcomes of their learning. . . . The ability to work at one's own time and place and pace requires flexibility that we may unconsciously design out of our educational resources. . . . Wedemeyer recognized living required learning and learning required flexible access to a wide array of resources, access that technology could facilitate. (Gibson 2008, 225)

Chuck Wedemeyer mentored Michael G. Moore, whose concern for "learner autonomy" prompted him to ask, "How flexible is each instructional process to the requirements of the learners?" (Moore 1972, 81). Moore's well-known typology for assessing educational flexibility uses three dimensions: structure, dialogue, and control. "Programs offering greater flexibility," he argues, have "less structure," offer "greater opportunity for dialogue between teachers and learners," and give "more control of the teaching-learning process to the student" (Moore 2006, viii). In the context of today's collaborative technologies, words like *structure, dialogue,* and *control* do not feel so unusual, but let us not be complacent. Whose definitions of these terms might prevail in an institution? While Moore recognizes that digital technologies have prompted some increased flexibility, he sees stronger, less visible pressures working against it. He argues, therefore, for substantive changes in attitudes, policies, and operations: "Much more needs to be done. . . . Technological

and pedagogical flexibilities are limited, squeezed, and constrained by highly *inflexible institutional structures and almost totally inflexible national, state, and institutional policies*" (2006, ix; emphasis in the original). Examples of inflexibilities exist in this book, and they are not without irony, given the changing learning needs of adults over their life spans and the changes in society. As Dominique Abrioux, one of the former presidents of Athabasca University, asked, how do we reconcile the relative rigidity of traditional institutions "with the need for lifelong learning? Because lifelong learning means flexibility: you have to be allowed to do it around other activities" (interview: see Burge 2008, 14).

My third acknowledgement is to the generation of pioneers whose work across the second half of the twentieth century epitomized flexible ways to help adults gain a second chance for education. They showed how flexibility could work well in contexts before digital technology. They had to fight significant battles with traditionally minded administrators to change restrictive policies and open up accessibility and choice: they were "changing higher education so that it is more flexible in its attitude to what is permissible," as Greville Rumble once explained (interview: see Burge 2007, 4). Such "walking the talk" of flexibility needed courage, conviction, and perseverance. Now, this book shows members of the succeeding generation doing similar value-driven and critical thinking.

## SOME RECENT DISCUSSIONS OF FLEXIBILITY

Relatively recent literature contains many specific examples of flexibility in practice (e.g., De Boer and Collis 2009; Ling et al. 2001; Mackey and Livsey 2006; Mitchell 2008; Murray, Donohoe, and Goodhew 2004; Taylor 2000; Thorpe 2000). But here I set a broader introduction by referencing writers whose treatment of flexibility has been broad-ranging and grounded in gritty experience.

Ted Nunan's (2000) discussion of flexible learning as part of post-industrial, post-Fordist societal changes is still worth reading. He prompts us to dig into patterns and outcomes of covert and overt uses of power sheltered inside inflexible institutional practices. As you read the chapters

in this volume, recall Nunan's plea for more rigorous conceptual clarity: "Without an adequate analysis of the term 'flexible', however, institutions and teachers may drift into a confusion of contradictory practices and educationally unsound programmes, which benefit neither individuals nor society" (64).

Betty Collis and Jef Moonen (2001) link their eighteen lessons in educational change and technology application to their multi-layered definition of flexible learning. Arguing that flexible learning applies to many contexts (not just distance education), they focus on choices for learners that revolve around time, course content, entry requirements, teaching models and learning resources, and delivery and logistics (2001, 10). In acknowledging that implementing flexibility is never easy, they identify four "constraints" on flexibility and then analyze how the dynamics that underpin those constraints—institution, implementation, pedagogy, and technology—influence the actual experience of flexibility.

The Australian study on flexibility mentioned earlier (Ling et al. 2001) used seven domains to illuminate the defining concept of "guided choice": time, pace, place, content, learning style, assessment options, and choice about learning alone and/or in company with others. Provisions for flexibility would have to include such policies as credit transfer, open entry to programs, recognition of prior learning, multi-modes for staging programs, and flexible reward structures.

Badrul Khan's later work (2006) also uses a componential approach. He argues that flexibility has to be understood in the context of eight "categories" in which flexible learning may exist: "institutional, management, technological, pedagogical, ethical, interface design, resource support [and] evaluation" (9). Referring to the discourse of "anyone, anyplace, and anytime" post-secondary education, Kahn focuses on flexible learning as "an innovative approach for delivering well-designed, learner-centered, and interactive learning environments . . . by utilizing the attributes and resources of the Internet, digital technologies, and other modes of learning in concert with instructional design principles" (1). He goes on to ask, "Can we do what learners want?" (1). You will find in this volume some very practical, even hard-headed responses to that question.

First is the geographical range of the thirty-five authors. Those who accepted our invitation come from Australia, Canada, England, Ireland, Japan, New Zealand, Scotland, Singapore, South Africa, and the United States.

Second is the opportunity to "flex" your own route through the sections of this book. Three conceptual explorations are followed by four analyses of opposing forces that often attend institutional efforts to become more flexible. Seven "swamp" stories show practitioners tilling their tough territories of practice and offering insights after all the action. I borrow here from Donald Schön's famous distinction between the low-lying land and the high ground of professional practice (1995). The "swampy lowlands" contain "messy and confusing" problems that defy the high ground's prescriptive solutions based on more distanced "research-based theory and technique" (28).

When you emerge from the lowlands, pause a while and step into Arthur Wilson's meta-analysis, which comes from the mind of an experienced adult educator and academic leader in the field of adult education. Or head straight into the three chapters on compromises or trade-offs and discover who really gains the long-term practical advantage after all the struggles. Another meta-analysis, in the chapter by Chère Campbell Gibson and Terry Gibson, uses the well-known Kurt Lewin Force Field Analysis model.

Three bold contrarian voices—those of David Harris, Adrian Kirkwood, and Alan Woodley—reach out to provoke us, each showing the conviction of long experience and challenging us to do some reframing. Katherine Nicoll then takes on the contrarians' thinking and reflects on what their arguments mean to her in terms of distance- and lifelong-learning discourses. She helps us to interrogate our practice critically. Finally, my two co-editors and I summarize the issues and possibilities that stand out for us and that might encourage a synthesis of some of the many aspects of flexibility.

To our colleagues who have dared to critique the canonical, thank you. To you as reader, enjoy the journey.

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## ABOUT THE AUTHOR

Growing up in a key wine-growing region of Australia, Liz Burge learned how vignerons flex their thinking through the complexities of grape growing and wine production. While tolerating the rigidities of face-to-face baccalaureate part-time studies, she worked in libraries and vocational colleges, where her own flexible thinking had to match that of her clients. Completing master's and doctoral studies at the University of Toronto–OISE while managing two service units there helped her to bend and even flaunt some rules with varying degrees of discretion, especially when the

needs of distance-mode students had to be foremost. Now, almost at the end of professing adult education at the University of New Brunswick in Canada and many years of service to distance education, Liz looks forward to learning new lives and rediscovering that wine region. www.unbf.ca/education/faculty/burge.html.

# ONE

## › CLARIFYING THE CONCEPT

# Introduction

Since the concept of flexibility is loaded with various meanings, we asked several writers for their latest thinking. Denise Kirkpatrick is a pioneer analyst of the concept. She uses her work as a senior administrator at the UK's Open University to carry forward the practical implications of the university's famous, revolutionary, and forty-year-old mantra: "Open to people, places, methods and ideas." Today, educators are beginning to understand better the alleged revolutionary impacts of collaborative Web 2.0 technologies. But issues of choice, cost efficiency, and quality thread through Denise's analysis, leading her to outline a key risk when technology-dependent ways are used to democratize learning. Julie Willems, in contrast, focuses solely on the student view. She knows how students think about their complex needs for choice around course and personal logistics, how they develop their expectations of teaching and learning. The implications for educators? If we are not serious about being perceived as flexible toward student needs, then we face the results of relentless market competition. Der-Thanq (Victor) Chen, Rose Liang, and Yu-mei Wang extend the current definitional discussions. Instead of hoping to demolish inflexibilities (not a productive way to go), they consider the (often covert) influence of embedded cultural/institutional social systems and the limits around personal decision making (agency). After arguing for a more sophisticated view of "the dialectical relationship between structure and agency"—meaning, in effect, that students must feel able and free to negotiate some adaptations of their learning processes with the course facilitator—Victor, Rose, and Yu-mei pose eight questions designed to ground their thinking in daily realities.

# 1 › Flexibility in the Twenty-First Century *The Challenge of Web 2.0*

DENISE KIRKPATRICK

The growth of Web 2.0—which is characterized by openness, personalization, mobility, and immediacy—has profound implications for educational institutions. As we explore the flexibility that is possible in the twenty-first century, enabled by Web 2.0, our efforts to provide quality flexible opportunities for learners are challenged by requirements for increased accountability and attention to quality assurance. The current financial turmoil will result in massive change for post-secondary education, and our values and views of flexibility must surely also come under greater scrutiny.

Flexible learning and the desire to offer more flexible access to education are not new, and neither was flexible learning a new concept twenty years ago when the Internet and the opportunity it presented for more flexibility excited us so much. The ideas of flexibility and flexible learning remain as described by Fleming (1993), Kirkpatrick (1997), Kirkpatrick and Jakupec (1999), and Thomas (1995) in the 1990s. What can we learn from our reflections on the past two decades and how can we use this to help us shape the future of education?

Colleges and universities seek to increase flexibility of access and opportunity, whether it involves entry to education or opportunities to study in more convenient and personalized ways. Flexibility is attractive to students and employers in an increasingly competitive environment; students expect and need greater convenience and flexibility—in their choice of materials, their pace and timing, and their ways of learning. The use of technology and the associated flexible approaches to learning can also allow more flexibility of staffing, and the deployment of staff can be more responsive to changed circumstances. However, the new technologies that offer us so much more opportunity for flexibility are accompanied by new challenges.

As a senior university manager with responsibility for providing the infrastructure and support for learning and teaching, along with ensuring high academic standards and effective quality-assurance approaches, I have found that the desire to provide our students with high levels of flexibility is not straightforward. Among the main issues that claim my attention as an administrator at the Open University are the following:

- How can we provide flexibility without complexity and create minimal confusion for our students and staff? How much choice is too much? Ultimate and infinite choice can restrict learners in ways that are different from those barriers of the past but that inhibit participation just as effectively. Are our students equipped with the skills to make informed choices about their learning and to use effectively the new tools available? Where does our responsibility begin and end in assisting students in navigating their way through the vast array of information and resources freely available to them?
- How can we provide flexibility in cost-efficient ways? As we seek to provide students with choice in relation to the media through which they learn, the approach to a subject, or of the type of assessment, is it possible to offer such choice without increasing costs and workload for staff and students? How do we ensure that learners can use these new forms—do students and staff require new literacies? Our understanding of just what is involved is still developing, and the provision of appropriate staff and student training in relevant ways is compromised. Institutions need to ensure that all materials are accessible—to those with disabilities, special needs, and limited connectivity, and across platforms.
- Maintaining and assuring quality is increasingly difficult in a world where learners create and co-create knowledge. The wisdom of the crowds is not always peer reviewed or quality assured. As our students are accessing the vast and rapidly growing body of information on the Web, how do they and we assess the value and credibility of sources? In a world where academics can build their courses "on the fly"—in real time, incorporating late-breaking news—and where students can create and co-create content, how do we ensure the quality of the materials, assure the authority, and

address the requirement that all learners have an equivalent learning experience? Meeting legal and statutory compliance requirements regarding accessibility and an institution's commitment to equity are challenged by the extent of flexibility that is now possible.

These three areas are profoundly affected by the rise of Web 2.0 and its influence in the lives of our students, as well as its potentially disruptive influence on the ways in which educational institutions are used to conducting the business of education. We are excited and enthused by the opportunities created by technologies, but we must find ways of managing these opportunities in a world that is requiring greater cost effectiveness, higher levels of efficiency, and assurance of standards. In the Web 2.0 decentralized world, we must manage our institutional resources, exploit the opportunities of Web 2.0, and ensure that learners are still provided with the best possible learning experiences and opportunities.

At this stage, we are a long way from having all the answers, but we need to be exploring the questions and their implications. The Open University has a forty-year history of providing educational opportunities to those who previously had been denied access to a university education for whatever reason. We are open to people, open to places, open to method, and open to ideas. So for us, the question of flexibility has always been central.

Over the past five years, the educational community has focused increased attention on Web 2.0 technologies. This term describes a raft of Internet applications that include social networking, wikis, folksonomies, virtual societies, blogging, multiplayer online gaming, and mash-ups (Committee of Inquiry into the Changing Learner Experience 2009). The common characteristic of all applications is that they support Internet-based interaction between and within groups. Web 2.0 tools and services are often described as social software—software that is intended to be run by and for people and that fosters interaction, including social dynamics (Johnson, Levine, and Smith 2009).

Web 2.0 marks a distinct change of emphasis from the Internet applications of the last two decades. It facilitates "interactive" rather than "broadcast" forms of exchange: that is, sharing information from "many to many" rather than transmitting information from one to many.

Web 2.0 applications are built around the appropriation and sharing of content among communities of users, resulting in various forms of user-driven communication, collaboration, and content creation and re-creation. Commentators talk of a "read/write" Web, where users can easily generate their own content as well as consume content produced by others.

## WEB 2.0 MATTERS TO EDUCATION

Web 2.0 is likely to play an increasingly important role in higher education because it creates an environment where the learner is an active contributer, rather than a passive consumer, of content. As Web 2.0 is inherently social and involves the co-creation and use of knowledge, it fits well with social and constructivist pedagogies.

As long as one has access to the Internet and good bandwidth, the barriers to use are low. Teachers and students can use many Web 2.0 tools at no direct cost and with minimal training and equipment. There are no license agreements but also no responsibilities on the part of the provider. Open accessibility to Web 2.0 means that staff and students could potentially be making use of a wide range of tools—different tools across courses with no assurance that those tools will be available next week, next month, or next year. Proliferation and potentially unlimited choice also restricts the institution's capacity to provide reliable and informative help desk and student-support services. While students and staff may choose any one of many similar tools, they may not necessarily know the full range that is available and on what basis to decide which to use. They may, therefore, spend unnecessary amounts of time locating, selecting, "playing" with, and becoming familiar with tools before they get down to the business of "learning."

### *Social Networking*

Social networking has become one of the most prominent and popular Web 2.0 tools. In addition to popular applications such as MySpace and Facebook, more specialized sites support professional and other interest groups. Social networking sites provide environments for democratic forms of self-expression and interaction among users. Social networking

applications, which are especially popular with younger users, are oriented toward self-presentation, the viewing of others' personal information, and institutional life in school, university, or workplace.

Social-networking applications share many of the qualities of a good education technology, supporting peer feedback and matching the social contexts of learning such as the school, university, or local community. The conversational, collaborative, and communal qualities of social-networking services facilitate an active participatory role for users—exactly what we want to encourage in learning contexts.

Social-networking services may also benefit learners by allowing them to enter new networks of collaborative learning, often based on interests and affinities not catered for in their immediate educational environment. This has led to arguments that Web 2.0 will result in the reorganization of educational provision away from campus-based institutions and toward online environments and spaces.

*Cloud Computing*

Associated with Web 2.0 is the growth of cloud computing and its potential to unbundle and repackage, captured in the acts of ripping, mixing, and burning. The cloud allows the unbundling of services and supports a world of "mashed-up" IT applications, expression, ideas, and scholarship. Ideas are mashed together with other ideas, commented on, transformed, and embedded as they move around the world. As Katz (2008) reminds us, this unbundling provides academics with unprecedented access to other scholars and amateurs in their field, but it can also cause fragmentation across an institution and disrupt its information, information service, and information resources.

Just as the cloud makes it possible for producers to deconstruct and re-source their services, it allows consumers to assemble their worlds as they wish. Such an infrastructure that empowers users to configure and contextualize their world directly supports the core educational mission of creating, transferring, and transforming knowledge within communities. And today's students are doing just that—they are using these tools to arrange their worlds. Higher education is traditionally organized in a producer-centric manner. In an unbundled cloud, where consumers are fully empowered to create their own worlds, students may lose confidence

in the capacity of formal educational institutions to construct curricula that meet their needs.

Virtual and immersive environments such as Second Life can be sites for serious academic work and commerce, and will demand the same quality attention that is devoted to physical campus infrastructure. Already, many staff and students interact in online collaborative environments. When we design these environments, we must ensure that this done in a way that encourages good academic practices and safeguards assessment. The unbundling capacity of cloud capabilities will make it possible for staff and students to assemble just-in-time collaborative environments and infrastructure and open-source tools to facilitate a specific instance of a learning experience. It is important that we have ways of capturing this process—that it is not ephemeral and can be revisited and made subject to scrutiny.

The freedom to mash up, extend, connect, hyperlink, and so on challenges many of our traditional ideas about scholarly quality, method, and literacy. The usability and authority of Wikipedia as a scholarly resource is debated endlessly because of its ephemeral nature and reservations about the bona fides of its contributors. Mash-ups can obscure our understanding of authorship and authority, and the identification of the author.

There is no question that information technology, networks, and the onslaught of digital data can change in fundamental ways how we "do" teaching and learning—our challenge is to ensure that we do not lose sight of what matters in terms of quality pedagogy and learning experiences.

## THE DISRUPTIVE POWER OF WEB 2.0

Web 2.0 has a profoundly disruptive capacity. Critics claim that Web 2.0 contributes to the development of "a culture of disrespect" between learners and formal-education providers. (See, for example, Noss and Selwyn 2008.) Students who view themselves as consumers do not hesitate to use social networks to post comments about unsatisfactory experiences with teachers and institutions. Web 2.0 technologies therefore have the capacity to realign power relations between teachers and learners. The empowering nature of these technology practices is welcomed by some, while others describe it more negatively as the sinister downside of modern technology.

Concerns have been raised that Web 2.0 tools distance students from the offline realities of their formal education. Bugeja (2006) claims that the ways in which students use Web 2.0 tools on campus could be interpreted as a misuse of resources. He suggests that many of these tools assist students in disengaging from their studies: "Information in the classroom was supposed to bridge digital divides and enhance student research. Increasingly, however, networks are being used to entertain members of 'the Facebook generation' who text-message during class, talk on their cell phones during labs, and listen to iPods rather than guest speakers in the wireless lecture hall."

It is not surprising that Web 2.0 is currently the focus of educational debate—not least over the continued viability of schooling. We must seek ways to use these technologies to recast learning as more dynamic, desirable, and democratic. If we cannot achieve this, then we risk "dumbing down" education and alienating learners.

## CONSEQUENCES OF WEB 2.0

In the longer term, there is likely to be a blurring of institutional boundaries as those boundaries become more permeable, with virtual learning environments outside the institution (including people who are not members of that institution) and with more information used by students residing outside the institution. Web 2.0 supports the co-creation of knowledge and online collaborative activities that can transcend institutional and national boundaries, creating truly global and distributed communities of learners. Students who are already using these technologies are not only willing to use them in their learning but expect to do so. Many of these online tools are free and come without the restrictions found in many institutional systems. They offer the ability to aggregate data information and ideas from different sources easily and quickly, and the material remains available to students after they have left the institution.

However, some tools and products may be ephemeral, and there are concerns about the longevity and continued availability of others. It is difficult to keep pace with technologies and products that appear (and disappear) at such a rapid pace. If we are using these tools in support

of learning in formal accredited situations, we are exposed to significant risk unless we can guarantee their availability for at least the life of a course.

We still have much to learn about how these tools can be used effectively in learning and teaching, and consequently, staff development and support lags behind staff need. It is harder (some may argue impossible) to exert institutional control over what happens in spaces outside the university even when those spaces are being used for learning and teaching. The use of external systems means that students may have to make use of many more usernames and passwords, and their learning space may become fragmented.

In a Web 2.0 world, an institution's ability to control access to both the information and the technology that students use in their study is reduced. Students using Web 2.0 will have a number of relationships with different providers.

The current use of Web 2.0 in higher education is best described as ad hoc. There is little real experience of using Web 2.0 in learning and teaching, or in learner support, and it is not yet clear just how to use it to greatest pedagogic effect. Institutions are only just beginning to develop policies to govern and manage its use and to address quality-assurance concerns and appropriate student use.

## LIVING WITH WEB 2.0

Web 2.0 is no longer simply the preserve of a few enthusiasts. Technologies are developing rapidly, and our understanding of their value in education is still limited. It will be some time before we understand the extent of the affordances that each technology offers and where each technology is likely to be appropriate and effective. Creation, collaboration, and communication are core to Web 2.0, so it is not surprising that supporters have been eager to identify its potential for supporting and enhancing learning. While the confident claims that Web 2.0 heralds an imminent transformation of learning and teaching are unlikely to be realized, it is extremely likely that Web 2.0 will play an increasingly significant role in higher education, as it will in life and business.

Students enrolling in post-secondary institutions are using Web 2.0 in their social lives and at work, and have probably used it in previous study, so they will expect to use it in their courses. We will need to be ready to respond to this demand and expectation in a way that is manageable and sustainable. We must address the policy and governance gaps to ensure that we can meet our obligations to students and society, as well as to our funders and accrediting agencies.

In 2008, analysts at Gartner Research suggested that Web 2.0 was falling into the "trough of disillusionment" in their Hype Cycle of Emerging Technologies (see Schonfeld 2008). In Gartner's 2010 Hype Cycle, Web 2.0 no longer appears, being dealt with instead by means of industry- and application-specific examples. However, the impact of Web 2.0 is reflected in the rise, for example, of social analytics.

Our challenge is to manage the increasingly permeable boundaries between the university and the world so that we enhance the ability of staff and students to interact with and participate in the world, while avoiding a fragmentation of coherent university systems. Traditional frameworks for the development of academic knowledge do not sit comfortably with the speed of information sharing and information production that the Internet supports. An absence of new pedagogic models creates uncertainty for students and staff, and this is a challenge that we must tackle with great urgency.

We may have refined the ways in which we use institutional, systems-based technologies to provide flexibility, but Web 2.0 presents new opportunities and new dilemmas. Universities and colleges remain challenged by questions of facilitating flexible learning in ways that are sustainable, affordable, and practical.

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## ABOUT THE AUTHOR

After working as a manager and academic in a number of Australian universities specializing in flexible and distance learning, Denise Kirkpatrick moved to the UK to work at the Open University (UK). Her current role combines innovation in learning, teaching, and the use of technologies with academic quality assurance. She enjoys the challenges and tensions created by this combination. Denise is passionately interested in the different ways in which learners approach problems and in the creation of novel and creative solutions to challenges in learning and work. She loves working on multiple problems and is constantly seeking new challenges. Exploring the use of technologies in learning and teaching ensures that she is always busy and challenged. www.open.ac.uk/pvc-lt/p2.shtml

# 2 › Students' Perceptions *Flexing Pedagogy and Practice*

JULIE WILLEMS

The interlinked terms *flexible learning* and *flexible delivery*, in both skills-based and knowledge-based post-secondary contexts, have been conceptualized in a vast number of ways and according to the perspective of the various stakeholders involved. These stakeholders have been identified as the politicians, managers, administrators, marketers, program and product developers, teachers, support staff, and students involved in any flexible-learning program (Willems 2005).

My focus is on the perceptions held by the end-users of flexible learning and delivery: the students themselves. This client base is far from homogeneous: like other stakeholder groups, students approach flexible learning with diverse perceptions and desires. In terms of learning, what constitutes "flexible" for one student can be "rigid" for another. To inform pedagogy and practice, this chapter explores some of the many interpretations of flexible learning from a student-centred perspective, reinforcing these viewpoints with case study examples (Willems 2004).

## FLEXIBLE LEARNING, FLEXIBLE DELIVERY

Flexible learning is a philosophical perspective. Many definitions of *flexible learning* suggest that it is a student-centred approach to learning, the hallmark of which "is its adaptability to learners' needs and circumstances" (Bowles 2004, 16). This notion of personal adaptability is certainly a desirable aspect for students, who take quite literally the notion that flexible learning enables "learners to learn when they want (frequency, timing, duration), how they want (modes of learning), and what they want (that is learners can define what constitutes learning to them)" (Van den Brande

1993, 2). The practical implementation of flexible learning is termed *flexible delivery*. As with flexible learning, flexible delivery can also be conceptualized in many ways, from traditional correspondence-style approaches to fully online offerings. However, according to Latchem and Moran (1998, 67), the rhetoric of flexible learning "currently outstrips practice," creating a possible disjuncture between expectations and understandings.

Flexible learning, from a student's perspective, is premised on the notion of student-centredness (Taylor 2000). Student-centred learning is associated with both humanist and constructivist (e.g., Willis 2009) educational philosophies, which see students as central in their own learning process. The combination of modern technologies and student-centred approaches to learning (Bridgland and Blanchard 2001) has led to a perception of flexible learning as "a movement away from a situation in which key decisions about learning dimensions are made in advance by the instructor or institution, towards a situation where the learner has a range of options from which to choose" (Collis and Moonen 2001, 10).

Research on equity issues in computer-mediated tertiary distance education highlighted a number of discrepancies between students' perceptions of flexible learning and their actual experiences (Willems 2004). In this case study research, *flexibility* was a synonym for the diverse characteristics of flexible learning that were desired or required by students. Collis and Margaryan (2007, 272) discern two main ways in which flexible learning and delivery are conceptualized by stakeholders: logistical flexibility, the most common interpretation, which pertains to practical aspects of the course and its delivery (the "when they want" and "what they want"), and pedagogical flexibility, which is less common and relates to student choices in flexible-learning contexts (the "how they want" and "what they want"). These two classifications help us to explore students' perceptions of flexible learning.

## STUDENTS' PERCEPTIONS OF LOGISTICAL FLEXIBILITY: THE "WHEN THEY WANT" AND "WHAT THEY WANT"

### *Flexible Learning, as in Available Out-of-Hours*

Freeing post-secondary education from the confines of the nine-to-five world, or from the fixed parameters of the academic year, is desirable

for many students in post-secondary education and training. Indeed, it may be the only opportunity for some to improve their personal capital within a competitive job market. Gatta (2005, 15) writes that for many of the working poor, flexible learning is the "third shift" in the working day, after their first shift of paid employment and their second shift of unpaid labour as parents and homemakers.

One third-shift student is "Liz," a recently separated mother who works full-time during the day to support her family (Willems 2004). After hours, Liz does household chores and helps her teens with their homework. The household has one computer and Liz has had to set up a roster for its use. Her timetabled use of the computer is from 9:00 to 11:00 at night, after her children are in bed.

However, the third shift does not always happen at night. Another example of a third-shift student is "Janette" (Willems 2004), a single parent who has a low-paid, part-time job. Janette studies at home during the day when the children are at school and at times when she is not working. One of the benefits of studying during the day for Janette is that she can better access her dial-up Internet when public demand is not at its premium.

*Flexible Learning, as in Accessible 24/7*

A related perception is that flexible learning is "available 24 hours a day, 7 days a week" (Oblinger, Barone, and Hawkins 2001, 2). "Angelina" is a rural student from a non-English-speaking background (Willems 2004). The combination of 24-hour availability plus the asynchronous nature of the communication tools of email and discussion forum allow her to communicate with her peers "whenever," even if it is at 2:00 a.m.

For others, 24/7 availability invokes the notion of immediacy. Flexible learners can become frustrated when their system is accessible 24/7 but their lecturers/tutors are only available occasionally. One person who experiences this disjuncture is "Diane," who gets frustrated at the length of time it takes to get responses back from her lecturers via email or on the subject forum (Willems 2004). She would like to see a maximum time limit established for responses so that students aren't left frustrated or confused. Often, a timely brief message from the instructor can serve to allay concerns. Powers and Salmon (2007, 202) urge educators to make their

availability clear to their students from the outset. They suggest the development of a tiered priority system for responses, with the base tier being simple generic responses such as "I have received your assignment . . . " or "When I have completed all assignments . . ." A navigational direction to an online FAQ sheet can also be useful in the tier process. Burge (2007, 36) labels these key elements of effective flexible learning as "respect for and responsiveness to learners' needs."

While flexible learning might be the key to institutional longevity, its implementation can be associated with larger teaching loads and class sizes, which in turn impact on both the individuals who deliver the instruction and those who enroll in it. Powers and Salmon (2007) suggest that the best way to overcome workload challenges in flexible-learning environments is through negotiation between staff and students around workload, student contact, and time-management parameters of the learning space. In this way, shared understandings of expectations may be created.

*Flexible Learning, as in Available Off-site*

Milliron (2008) has argued that with the expectation of blended-learning opportunities in the new generation of flexible learning, the line between face-to-face and distance education is blurred. Latchem (2004, 22) argues that if a flexible learning approach is advocated for the students, it must also be the focus of professional-development programs to train staff in best practice in flexible-learning options. From a student's perspective, this means being able to pick and choose, creating a mélange of on-campus and off-campus courses in situations, for example, where there are timetable clashes.

Flexible-learning options are sought after by students who are unable to attend on-campus, onsite courses due to a range of issues, from having a disability through to living in rural and remote areas. For "Cindy," flexible learning has provided entry to university studies (Willems 2004). While she would have preferred to study on campus at one of her local universities, she "missed the cut" of student selection and was instead offered a place at a university on the other side of the country as a flexible learner, for which she is grateful. "Ken" is a flexible learner for the sole reason that his subjects are only available in an off-campus mode

(Willems 2004). Ken misses what he considers to be the social and academic benefits of studying on campus and considers flexible learning an "impoverished" way of studying.

For some students, the inverse is true: they may feel impoverished in being required to attend on campus and in person and so have enrolled in flexible, off-campus learning to avoid such challenges as costs, time, travel, or child care issues. Take the story of "Susan," for example (Willems 2004). Susan, a mature student and mother of two, lives in a coastal town in Australia, some three hours drive from the closest university. In addition to distance issues and income, Susan enrolled to overcome child care problems. While she was reassured that her course was entirely flexible, she did not realize that there was a compulsory on-campus residential computer-and-study-skills workshop to complete prior to her enrolment. Susan told me that although she "busted a gut" to get to the residential in terms of finding child care, negotiating transport, and finding the necessary funds in order to attend, she still felt "lost" after completing the course, stating that it was too fast paced for mature students with little computer experience. In other words, it was a waste of precious financial resources for a family that was already stretched economically.

*Flexible Learning, as in Extendable Deadlines*

Many students choose flexible-learning options so that they can complete their studies over an extended period of time. This key requirement concerns the notion of learner control over the sequence and timing of study (Burns, Williams, and Barnett 1997). However, despite the espoused notions of flexible learning, some institutions or educators may be quite rigid and inflexible when it comes to issues of open-endedness, even in cases of special consideration.

"Sarah," a student who has a chronic illness that requires occasional admissions to hospital, learned the hard way that flexible learning can indeed be quite inflexible (Willems 2004). Following discharge from one such unexpected two-week hospitalization, Sarah contacted a subject coordinator to ask for an extension for a by-then-overdue assignment. He refused on the grounds that for such a request to be granted, she should have sought an extension from him prior to her unexpected hospitalization! Sarah feels that if students enroll in flexible courses, especially

if they do so for equity reasons, they should be granted true flexibility. Instead, she now has the multiple penalty of paying for a course that she could not complete due to the non-acceptance of her final assignment, carrying an academic record with a failed subject, and having to pay to undertake the subject again next year. She is not happy!

*Flexible Learning, as in Lowering Costs*

For some students, flexible learning is associated with a reduction of costs that would be incurred if they had to attend in person for further learning or training. Gatta (2005, 14) argues, for example, that flexible learning can help to save on some of the potential study-related costs for low-income families, such as child care and transportation.

Other interpretations of cost reductions are of benefit to institutions or organizations. For example, the placing of unit materials totally online or on CD-ROMs is all part of considering the reduction of production costs and the improvement of return on investment. Yet for students, such moves might actually increase personal costs. For "Sharon," a mature student who is visually impaired and suffers from rheumatoid arthritis, the move from printed course materials to online study materials has increased the challenges that she faces: the job of downloading and printing flexible-learning materials is both costly and time-consuming (Willems 2004).

*Flexible Learning, as in Portability*

For many students, especially distance learners, *portability* is a key synonym for *flexibility*. *Portability* can be defined as "the capacity to use resources in multiple settings" (Bridgland and Blanchard 2001, 181). However, there are two ways to interpret this definition. One notion of portability involves flexible-learning materials, assessment repositories, libraries, and peer communities that all exist virtually so that they can be accessible anywhere, at any time. This allows students like "Marianne" (Willems 2004), who lives in a rural town and holds a full-time job, to access materials whenever she needs to. However, for other flexible learners, fully online materials can actually pose difficulties.

The second notion of portability is the antithesis of virtual materials and electronic access. For some students, portability means being able to open—any time, anywhere—print-based documents that have been

provided by the educational institution. "Diane," another rural student, chose flexible learning for a number of reasons, not least of which were her rural residence, her young family, her work-related travel, and her appreciation of the portability of her printed hard-copy course materials (Willems 2005). She now finds the shift to a fully online system limiting: it requires her to be tethered to electronics. "Sharon," described earlier, hopes that her institution will return to providing "real" options for flexible learners, which she understands to mean that the necessary materials are available either online or in hard-copy format, thus giving her a choice.

## STUDENTS' PERCEPTIONS OF PEDAGOGICAL FLEXIBILITY: "HOW THEY WANT" AND "WHAT THEY WANT"

### *Flexible Learning, as in Multimedia Formats, Including Social Sharing Applications*

Learning in the new millennium brings with it expectations to learn within multimedia environments that are also social and collaborative. Today, flexible-learning options are associated with the social-sharing software of Web 2.0 such as Facebook and SecondLife. Oblinger (2007, 136–37), writing from the perspective of teaching in flexible-learning environments, notes that "many of our challenges will come from the emerging digital culture. . . . Web 2.0 is all about interacting with information and with people. A few features may be particularly relevant . . . : they are choice, co-creation, distributed cognition, distributed learning communities and multi-modal contexts."

Yet despite multimedia or social-sharing opportunities, flexible learning may be designed in terms of print-based instructivist environments, and some students may struggle with this predominance of textual communication. Some off-campus students, for example, stated that their learning environment would be better if they could see visual images of the people with whom they are communicating (Willems 2004). "Mary," who is slowly rebuilding her life after a horrific car accident, suffers from social isolation. She likes her subject forums but would prefer the addition of photos of participants to generate the feeling of a social connection with her learning community.

*Flexible Learning, as in Adaptable Learning Environments for Personal Learning Styles*

Students vary greatly in their personal, idiosyncratic learning styles, so the use of a variety of formats that store information and enable its processing—alone or in groups—is essential. However, the perception remains that flexible-learning systems are mere reincarnations of former correspondence-style solutions in online formats. "Ruth," a mother of six who was considering enrolling in a trade-related course to improve family income, stated that she could not "do" flexible learning in the sense of the predominantly print-based coursework and assessment tasks that she sees coming from her local higher-education provider because she is a visual learner (Willems 2009). Instead, she would consider enrolling with a provider that enables her to learn using such visual forms of communication as graphics and video, which she finds personally engaging.

*Flexible Learning, as in Content Relevant to the Real World*

Flexible learning may also be understood as meaning learning options that are applicable to the real world. Gatta (2005, 5) notes that central to the development of many flexible-learning systems is the "development of a flexible and customized system that addresses the lifelong learning and skills training needs of existing and potential workers in concert with the skills demanded by employers." However, not all flexible-learning scenarios deliver the required skill sets in a scaffolded manner. I have already touched on the issue of how mature students are sometimes disadvantaged by relatively weak computer skills, a barrier they must work to overcome. Some students feel that they are plunged too early into complex content and left alone to cope—a sink-or-swim mentality.

*Flexible Learning, as in Learner Choice in Types of Assessment*

The term *flexible learning* may also have associations with alternative assessment possibilities. Morgan and Bird (2007) argue that this aspect of flexible learning has been a relatively neglected topic of scholarly enquiry. Learner choice in assessment tasks can be an empowering experience, especially for mature learners. Flexible assessment may range from individual to collaborative submissions and from monomedia (a singular

media source such as text) to multimedia. Alternatives to essay submissions may include digital storytelling, online role plays, the creation of e-portfolios, and the like.

However, student choice in assessments can have negative impacts on assessors' workloads (Morgan and Bird 2007, 257). This problem may be overcome by clearly defining student learning outcomes, establishing parameters for student choices, and constructing assessment rubrics for the range of media that might be used.

## CONCLUSION

Learning is a subjective experience, and as a result, the reality of flexible learning from the students' perspective is that it has many faces. For some, what is offered is indeed flexible and meets their needs and/or expectations. For others, however, what is offered is perceived to be inflexible, despite the espoused name. If the provision of student-centred flexible learning is indeed a stated goal for an institution, then the key stakeholders need to actively listen to the students' expression of their real needs, as diverse as they are. As Oblinger (2007, 135) argues, "If our programmes are not relevant to learners' needs, we do everyone a disservice."

Student-centred flexible learning, then, is defined as meeting the variety of relevant learning needs of students, in terms of logistical and pedagogical perspectives. Those who understand this and work out effective solutions to offer true student choice in the "when they want," "what they want," and "how they want" of flexible learning have much to gain in the competitive market of the new millennium.

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## ABOUT THE AUTHOR

Julie Willems is inclined to be "polymathic." While training as a registered nurse, she worked as a voluntary youth counsellor and also performed and taught music. After acquiring her nursing qualifications, she began working toward a bachelor's degree in arts via distance education while she was studying music in Amsterdam. Returning to Australia, she combined raising a family, voluntary community work, and paid employment—nursing, music performance, and teaching in a variety of sectors, ultimately in both face-to-face and distance contexts. Twenty years of flexible studies culminated in her master's degree in education, during which she examined equity issues in online learning. Her motto? Never give up! Her PhD research explored learning styles in e-environments.

Julie's current research focus is on best practices in distance and flexible learning, and in particular, on equity issues. She is presently a research academic with DEHub, a consortium of five universities concerned with promoting best practice in distance education. http://wikieducator.org/User:Julie_Willems

# 3 › Structured Flexible Learning *Making Informed Design Choices*

DER-THANQ (VICTOR) CHEN, ROSE LIANG, AND YU-MEI WANG

One limitation of the predominant interpretations of flexible learning is the presumption that flexibility is "good" and that it has specific aims, efficiencies, and outcomes, such as enabling access to learning. These presumptions, however, are not fully substantiated by research and other literature. Another limitation is the lack of consideration of the need to install new or to revise entrenched organizational structures to achieve the desired flexibility. We suggest that a modified concept—structured flexible learning (SFL), situated within a structure/agency dialectical framework—would be a productive move beyond the current discourse on flexible learning.

We write partly from the perspective of our personal experiences of teaching in institutes of higher education both in the East (China, Taiwan, Singapore) and the West (Canada, USA, New Zealand). We have observed that many people still regard the teaching process as relatively structured and based almost entirely on the presumed omniscience of the educator's planning and on what teachers decide is good for students. Higher-education structures are often criticized as inflexible and not conducive to learning. Our empirical work has, however, convinced us that structures (that is, rules) can play a legitimate role in facilitating class discussions, although both teachers and students need to play their part in devising these rules (Chen, Wang, and Hung 2009). We will address this issue in more detail below.

An earlier analysis (Chen 2003) of the varieties of flexibility associated with specific instructional modes revealed that they were inevitably coupled with inflexibilities, provisos, or the structural limitations of a particular form of flexibility. In order to make one aspect of the instruction

flexible, other aspects usually have to be more structured (Chen 2003). One example lies in synchronous locational flexibilities such as video conferencing, which allows for interaction beyond spatial constraints but brings logistical inflexibilities such as the requirement that the student report to a fixed broadcast station or the need for specific technological infrastructure, human support, and other resources. A further example concerns the temporal flexibility in online classes: while participants do not have to gather at the same time and the discussion may be more in depth and thoughtful without the pressure of immediacy (as in a face-to-face discussion), the learning pace must be established to ensure that everyone stays focused on the topic(s) at hand. Otherwise cognitive threading may be reduced and the discussions will have little or no commonality.

We recommend, then, that the flexible-learning discourse be redirected from the removal of inflexibilities—as far as that may be possible—to the design of more helpful structures for distance and online learning. Our own context calls for such a move. In seeing flexible learning as SFL, we do not wish to commit ourselves too hastily to the "goodness" of any particular form. We see SFL as a social process, with purposeful choice and informed decision making shaped by the context that students bring to their learning. We therefore call for a more rigorous examination of the concept of flexible learning.

We offer for critical analysis a modified concept that is grounded in a structure/agency theoretical framework. Before we explain, however, we return to aspects of the original term, *flexible learning*.

## FLEXIBLE LEARNING VERSUS STRUCTURED FLEXIBLE LEARNING

The commonly accepted definition *of flexible learning* sees the provision of flexible access to learning experiences in terms of at least one of the following factors: time, place, pace, learning style, content, assessment, and pathways (e.g., Macquarie University 2001; Browne 1999; Ling et al. 2001). Such a view acknowledges that learning requires students' active engagement and more independence and responsibility for their own learning than normally occurs in traditional learning. Flexible learning is

intended to be student-centred rather than teacher-centred. Other characteristics include student collaboration with peers and/or practitioners in the field; provision of ample resources; a context-sensitive learning experience; greater emphasis on generic skills such as thinking, metacognition, and problem-solving; and a shift of the teacher's role from a source of knowledge to a facilitator throughout the student's learning journey (e.g., Bridgland and Blanchard 2001; George and Luke 1996; University of Sydney 1999).

In broader referential terms, flexible learning refers loosely to various terms such as *distance education*, *open learning*, *e-learning*, *technology-based learning*, and *blended learning*. The term *structured flexible learning (SFL)* includes all the descriptors noted above for flexible learning, but we argue that flexibility is necessarily formulated in a structure-agency framework. We will outline key concepts of this framework, especially the dialectical components, and suggest some practical possibilities and challenges.

## THE STRUCTURE-AGENCY FRAMEWORK IN THE SOCIAL SCIENCES

Structure-agency discourse identifies the questions to be raised about the nature of social existence and reality, and about the influence of structure and agency on social action. Social theorists have assumed different approaches to understanding this relationship. One approach (Althusser 2005; Clarke 1978; Durkheim 1982) argues that structure or culture should be viewed as determining social existence, social reality, and human social action. This approach assumes that students are unable to make any decisions related to their own learning. Therefore, for example, assigned projects need to be broken down into simplified and manageable tasks and the many interactions between student teams prescribed by the person in power over the students: the teacher.

In another approach (Blumer 1969; Garfinkel 1967; Homans 1974), the focus is on agency, which highlights the capacity of agents (individuals) to shape social existence, social reality, and human social action. This approach assumes that students, as agents, should be given as much

freedom as possible to excel in any direction they desire. Some alternative schooling approaches based on this approach have been tried, but most have not survived, and even those that have survived have for the most part been transformed into the third approach, described below. To our knowledge, the purist practice based on this agency approach does not exist.

We support a third approach, which argues that social structures strongly influence human behaviour and that humans are capable of simultaneously inhabiting and changing structures. We contend that this approach, with its insistence that structure and agency are co-linked in a dialectical fashion, provides a more productive understanding of flexible learning. This structure-agency framework draws on the work of Giddens (1984), Sewell (1992), and Hays (1994), who argue that structure and agency are co-determined and co-evolving. While their work was conducted in previous decades, these theorists drew attention to a continuing theme in the fields of sociology and other social sciences. Unfortunately, only recently have educators begun to appreciate their relevance to today's contexts. We believe that the structure-agency framework has particular relevance for elaborating our practice in twenty-first-century online flexible learning.

## SOCIAL SYSTEMS

Central to this structure-agency framework is the concept of social systems. We highlight two of its features. First, social systems, such as a course, are composed of social activities/practices that link persons across time and space. Through such activities, structure and agency are inter-related: for example, an online discussion (social activity) of an SFL course (social system) carries with it rules (structure) that guide how students should act (agency) (Chen, Wang, and Hung 2009; Salmon 2002, 2004). In other words, social structure is not external to action but internal to the flow of action that constitutes social practices (Layder 1998).

The second feature of social systems is their layering into manifold, interconnected levels. These levels can range from two people in social interaction to progressively larger units, from peer, to family, to

community, to national, regional, and global social groupings. When conducting an SFL course (a social system), we thus need to consider how other social systems impact the online social system. For example, most students try to relate to culturally diverse classmates in respectful ways because they have learned values and social relationships of multiracial living from their families, communities, and schools. This disposition is supported by a political discourse on the importance of valuing diversity, a founding principle of countries such as Singapore and New Zealand, and is reinforced by associated discourses that are regional (Association of Southeast Asian Nations 2003) and international (Office of the United Nations High Commissioner for Human Rights 2001).

SFL may therefore be conceptualized in a similar way: as a micro-level social system, a learning system (a course) is composed of social and learning activities. But SFL is not a self-contained system. Rather, it is interconnected to other levels of systems and subject to their differential influence. For example, a student may place other more pressing personal goals or values above those group-related values espoused in a course.

On the surface, our view of SFL as a social system appears similar to the traditional way of relating the social system and its interactions to a multi-level context of interacting influences (so-called variables). At a deeper level, however, the SFL approach is more integrative in orientation and highlights the importance of interweaving these multiple, overlapping influences into the learning system in qualitative rather than quantitative ways.

## HOW THE DIALECTIC IS APPLIED TO SFL

The dialectical relationship between structure and agency is mindful of social process and focuses on the evolution of aspects of a community (Giddens 1984). In the same way, SFL may be viewed as a social process in which the course facilitator as a knowledgeable agent designs a flexible-learning system (a course of study) in a specific way and students negotiate its implementation in a way that leads the facilitator to maintain or change the course design. For example, due to unique characteristics of each batch of students, group size can range from five or six to a dozen.

SFL course designers will initially need to make the decision about group size. However, they will be sensitive to student feedback and possibly adapt to the group's consensus in subsequent activities. Such feedback and respect given to student opinion are part of the social process by which students and the course facilitator co-evolve and co-constrain their social system.

Such ongoing engagement of both student and facilitator may involve them in questioning the very structure of a conventional course and the concept of what is meant by a course. These considerations can lead to novel course designs supportive of a genuine learning community. For example, we were involved in the design of a program in which the graduating competencies of the eight required courses of a postgraduate diploma program in teacher education were already identified. The program became flexibly structured in that the students assumed the initiative to craft their own projects and to seek collaboration and commitment from other students to participate in each other's projects. Students were also allowed to negotiate their learning in their own time and at their own pace. However, these strategies require participants to dialectically negotiate structures that lead to good results, such as sustained commitment to fellow classmates' projects once the decisions have been made. Depending on the progress of the various projects, these previously negotiated structures (or commitments) usually have to be renegotiated, in our experience at least. Another example of the dialectic at work is the mode of synchronous textual communication using Chat software. This communcation mode offers flexibility in where students learn (although not when students learn, given the real-time requirement) and allows for some interaction. However, it is linked with certain inflexibilities and constraints such as the need for typing skills, technological infrastructure, and low to moderate demands on resources, technology, time, instructional design, and/or administrative support.

Structure-agency dialectics may also be seen when individuals make purposeful decisions. For example, a course facilitator may design rules to facilitate fluent dialogue so that students can experience how effective discussion can lead to deep learning. However, as a result of overwhelming postings, students ask for fewer interactions, so the facilitation rules are modified accordingly.

## CONCLUSION

In summary, we view the best SFL as a dialectical process within a multi-layered social system, with purposeful choice and informed, negotiated decision making. Of course, what we argue for is not easily accomplished, especially when the time and intellectual energy demands place extra burdens on teachers. We have also learned that other challenges lie in changing the mindsets of both students and teachers, as well as existing institutional structures, which are formalized based on assumptions supporting traditional teacher-focused models of pedagogy. Questions therefore need to be asked in order to test the practicality of SFL across various international contexts. Here are some questions that we hope are useful:

1. How do we help students to better understand the structure and the social system in which they and the course are embedded? Once they are more knowledgeable about the structure, can they become more effective agents in effectively altering the structure of the course in constructive ways?
2. How willing and able might teachers be to invest in the work required in SFL? Which cultural contexts may help or hinder work toward respectful negotiations on class process?
3. In our recent work attempting to understand how SFL can be actualized, we engaged students in negotiating discussion rules (Chen, Wang, and Hung 2009). Results showed that the more we engage students in negotiating these supporting rules, the more productive their learning is.
4. Taking the above considerations further, how far might the structure-agency dialectic be empirically researched? How practical is SFL within the current constraints of institutional hierarchy, politics, and efficiency needs in schools and universities? For example, how might SFL courses be financially sustained? How might teachers give "fair" grades when SFL is intentionally designed to cater to individual needs? How do we three authors, as course facilitators, best balance our wishes for flexibility against competing institutional agendas and politics that do not subscribe to SFL ideals but see virtue in standardized, highly efficient operations? Why must a course be

defined by a fixed overall time frame and prescribed pace? Why can it not be seen as a community of learners in close interaction with each other? Have we asked enough questions? We look forward to hearing from you.

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## ABOUT THE AUTHORS

Der-Thanq (Victor) Chen has been geographically challenged since his youth. He once visited a friend in the northern part of Singapore and ended up in Malaysia without a passport! He now drives with Wency, his wife, who navigates while he holds the wheel. For this reason, he is a true follower of distributed cognition. He has leveraged this challenge by enjoying whatever shores he has landed on—Taiwan, USA, Singapore, New Zealand, and back to Singapore. Fortunately, he has found an anchor in cyberspace. Having experienced such challenges in the face-to-face environment, he decided to pursue a career in education, which allows him to help those students needing directions in life as well as those who may be lost in online spaces. He is now Head of the Learning Sciences

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Rose Liang began her undergraduate study in zoology but found that it didn't seem to provide answers to many questions. Instead of dissecting animals, she decided to "dissect" society by studying sociology. She became interested in issues of culture and ethnic relations, but eventually realized that sociology did not provide all the answers. Her move to education started in Canada, where she became involved in several projects, one of which involved creating distance-learning materials—but in a traditional, not an online, mode. Given this background, she considered herself computer-phobic. But she is now undergoing an identity transformation as she plays games on Facebook and speaks with her children via Skype—it's all about learning in the new media space. She is a research scientist at the Learning Sciences Lab at the National Institute of Education, Nanyang Technological University, in Singapore. http://lsl.nie.edu.sg/people/researchers/liang-yee-hing-rose

Yu-mei Wang took two weeks to learn how to double-click a mouse and was thoroughly embarrassed when she wrapped a disk label over the metal shutter of a floppy disk (a dinosaur compared with today's flash drive). Her talent for doing unusual things with the computer often elicited inquiries from her fellow students as to why she was pursuing a degree focused on computers in education. Just when she was about to be overwhelmed with self-doubt, she found her niche in email. She took an immediate liking to human connections across distance via machines. Human connections worldwide have since been her sustenance as she has pursued a career as an educational technology educator with an emphasis on and fascination for designing and delivering online courses. Yu-mei is an associate professor in the Department of Leadership, Special Education, Foundations, and Technology, at the University of Alabama at Birmingham. www.ed.uab.edu/ymwang/

# TWO

# › IDENTIFYING DRIVING AND RESTRAINING FORCES

# Introduction

In South Africa, Milly Daweti and Jean Mitchell admit to significant tensions in their work to expand flexible options in post-secondary education. They separate pre- and post-1994 South Africa to show how the driving and restraining forces around increased flexibility changed after the huge social transformation in the country. The new drivers of legislation, labour-market demands, subsidized higher education, and technology for flexible access also expose gaps between "the promise and the reality"—a situation that many agents for change in higher education beyond South Africa may well understand. We leave it to you to decide whether their chapter offers another case study of rhetoric versus reality, of assumed opportunities for student access and success versus restrictions or dropouts.

Cathy Gunn asks two questions that refuse to disappear: "Why is it that far fewer faculty than anticipated are prepared to engage with flexible learning, and what barriers exist between strategic intent and the translation of flexible learning principles into good educational practice"? She argues for a "capacity development framework" that really does reveal the forces that restrain institutional strategies. Three questions drive her thinking: "What are the missing links between policy and practice, why have they proved so persistent, and what can be done to address them?" One lesson she has learned is that flexibility across institutional operations can be most "elusive" despite the best-intentioned efforts.

Cultural diversity delivers (or should deliver) a strong impact on designing flexible approaches, according to Colin Latchem and Insung Jung. With the help of a famous fable, they remind us that "every culture needs to define flexibility within its own philosophical, theoretical, and operational frameworks," while remaining sensitive to cross-cultural issues. Asian countries are experiencing two main drivers toward greater flexibility—rapid expansion without escalation of costs and reform of higher-education administration. But serious longer-term costs of doing off-shore "business" may apply when trying to impose Western versions

of flexibility on other cultures or assuming that collaborative technologies will be accepted in very hierarchical and regulatory cultures.

The road to open and flexible education in New Zealand is not always smooth. Metaphorical potholes may wreck an innovator's chances of piloting a smooth ride through changes toward flexibility. Mary Simpson and Bill Anderson take a broad view. They argue that "government frameworks, teaching and research activities, institutional policies, and the digital environment" are the key danger points on the journey toward better access and success in higher education. If those were not enough potholes, these intrepid travellers have also seen the forces that work against greater flexibility in distance-mode education in dual-mode institutions. Mary and Bill have learned that innovators need to be very skilful drivers to weave through all the operational roads in an institution.

# 4 › Flexible Distance Education for Social Transformation

MILLY DAWETI AND JEAN MITCHELL

The concept of flexible learning holds much promise, especially when it comes to the redress of past educational inequalities. Definitions that include phrases such as "providing learning opportunities that can be accessed at any place and time," "giving learners increased choice," and "improving the learner's learning experience" (Dhanarajan 2001) suggest that flexible learning could be a feasible way for a country such as South Africa to provide educational opportunities for all its citizens. For us, flexibility means the creation of conditions that enable increased access to a wider choice of fields of study, curricula, and delivery modes, as well as to meaningful learning experiences that advance national transformation.

In this chapter, we consider key attempts made by the South African establishment to put flexible mechanisms in place in order to allow greater access to tertiary education for all South Africans. We explore the forces that drove the open distance learning in pre-1994 South Africa: the political system, historical inequalities, and the professionalization of teaching. We then focus on the drivers of today: the key driver—social transformation—and four enabling drivers: post-apartheid education legislation, labour-market demands, the subsidization of higher education, and emerging technologies. Each of these new drivers brings with it certain constraining forces that must be considered. Throughout, the tensions that exist between distance education and the need for massification, which is imperative if the country is to meet its educational and national development goals, remain a challenge.

## THE OLD DRIVERS OF OPEN DISTANCE LEARNING

As noted above, the old drivers of open distance learning in pre-1994 were the political system, historical inequalities, and professionalization of teaching.

*Political System Before 1994*

Before the first democratic elections of 1994, the education of different race groups was divided. In the pre-1994 political system, separate education departments existed and were not resourced equally. Funding was distributed unevenly on racial grounds. White education received much more revenue than the Indian and Coloured groups, while black education received the least. The teacher-learner ratio in black schools was 1:42, while classrooms in white schools enjoyed a ratio of 1:19. Moreover, only about 6 percent of teachers in black schools had university degrees and nearly 80 percent did not even have grade 12 (South African Foundation 1993). Universities were also segregated, although moves were made in the 1980s to make access to so-called white universities more possible for black students, especially in certain subject areas.

*Historical Inequalities*

In light of racial discrimination and inequalities of privilege, open distance learning (ODL) provided the ultimate opportunity for flexible learning for all citizens. For many decades, the University of South Africa (UNISA; www.unisa.ac.za) was the only dedicated distance-mode university. Enrolment was open to all races.

UNISA defines ODL as learning that bridges the time, geographic, economic, social, educational, and communication distances between the student and all aspects of the institution. It still focuses on removing barriers that hinder access to learning and on flexible provision of learning opportunities with the expectation that students can succeed (Pityana 2004; University of South Africa 2008).

UNISA has provided education as a second chance for many people, or "at the back door" (as Wedemeyer put it in 1981), since the late nineteenth century. While UNISA is the only university dedicated to ODL in South Africa, one could say that it and other correspondence institutions, such

as Lyceum and Careers Colleges, constituted South Africa's first generation of flexible-learning opportunities.

*Professionalization of Teaching*

In pre-1994 South Africa, the second generation of flexible learning sought to provide flexible programs to address certain gaps in the provision of primary, secondary, and tertiary education, with a specific focus on teacher education. In the 1970s and early 1980s, many teachers in disadvantaged communities held one- or two-year teacher-training diplomas that were equivalent to a grade 12 qualification. Student teachers from these communities had been encouraged to move from grade 10 (called the Junior Certificate) to teacher colleges, where they received a two-year training that allowed them to teach in primary schools. While these certificates afforded a certain amount of flexibility, enabling students to "fast-track" into their chosen profession, the hidden agenda was to ensure that black children did not receive the best education. This was in keeping with the apartheid regime's policy of underfunding and undervaluing education in certain sectors of the community. In the white community, this fast-tracking was not an option.

As the demand for better-trained teachers became evident, colleges that provided face-to-face in-service training were established. Vista University (en.wikipedia.org/wiki/Vista_University) was established in 1981, primarily to provide teacher upgrade programs via correspondence for underqualified black teachers. The program was more flexible, including not only correspondence but also annual discussion classes in which lecturers offered assignment feedback and examination preparation at centres across the country.

Teacher-upgrade programs were linked to incentives such as generous study and examination leave, as well as salary adjustments. It was in the interest of teachers to pursue these opportunities to advance their professional development, with rewards for successful completion of the qualifications and potential for career progression. While UNISA offered teacher-education courses, Vista University, funded by the Department of Education and Training, seemed to bridge the gap between school and university for underqualified but practising teachers.

Ostensibly, these students were able to teach in the mornings, thus keeping the schools operating while they studied in their spare time.

This should have been an ideal solution to the problem of underprepared teachers and the need to improve the quality of school teaching in the country. The programs offered by Vista University afforded thousands of teachers the opportunity to be upgraded and to receive the associated financial and career benefits. Sadly, the courses did little to upgrade their teaching skills for the positions they filled. Most of the teachers who qualified for the upgrading courses were primary school teachers, while the courses offered were aimed at high school teachers. Thus, the promise that the programs held for the improvement of education in the country did not materialize in practice as many of the teachers had no intention of moving from primary school to high school.

Later, Vista University diversified and established campuses in major cities in South Africa where graduate and postgraduate programs were offered. At a time of civil unrest, it provided a blended method of delivery, offering students face-to-face classes coupled with paper-based study materials. Students had the opportunity to attend classes when they could but to continue independently when they could not get to the campus. After the first democratic elections in the country in 1994, student access to mainstream universities became easier. Vista University subsequently experienced dwindling student numbers and finally closed in 2002.

## NEW DRIVERS OF FLEXIBILITY IN HIGHER EDUCATION

In post-apartheid South Africa, the key driver of flexibility in higher education is social transformation with four enabling drivers: post-apartheid education legislation, labour-market demands, subsidization of higher education, and emerging technologies. Each of these new drivers has associated constraining forces.

### *Social Transformation: The Overarching Driver*

As a developing country with its own history, South Africa has particular education needs. New policies since 1994 aim to undo the inequalities of education provision instituted during the apartheid regime. Given the wider implications of past racial discrimination and inequalities of

privilege, these policies had to create equal opportunities for all to access different types and levels of education. Flexible access, multiple entry routes, and varied modes of delivery at the tertiary level seemed to be the solution. Thus, the overarching driver of flexible learning in post-apartheid South Africa has been social transformation and the redress of past inequalities. New enabling drivers of flexibility in higher education emerged as part of the social transformation process. Key among these have been education-related legislation, including the National Qualifications Framework (NQF) and the recognition of prior learning (RPL); labour-market demands; subsidized higher education; and technology for flexible access to education. However, tensions related to unfinished business from earlier times exist between the promise and the reality.

*Education-Related Legislation*

*The National Qualifications Framework:* Foremost was the recognition that education had to attract and serve an increasingly diverse body of learners whose background was characterized by conditions of unequal opportunities. A unifying approach to education and training was required to replace previous separation by race, sex, and age; mental and manual demands of learning; theory and practice; and academic and vocational qualifications. The need to sustain quality was paramount.

A vehicle for ensuring such quality of education provision was the National Qualifications Framework (NQF). It was established in 1995 to promote the following principles relevant to our discussion here:

- Flexibility—allowing for multiple pathways to the same learning ends and recognizing non-formal provision or prior learning through life and work experience
- Access—providing ease of entry to appropriate levels of education and training for all prospective learners in a manner that facilitates progression
- Progression—ensuring that individuals can move through the levels of national qualifications through a clearly sequenced series of outcome requirements for higher levels on a learning pathway. (See South African Qualifications Authority 2000, 5–6.)

The NQF demands, guides, and monitors the flexibility of institutions and their program offerings. Flexibility has to be evident in institutional missions, program range, and teaching and learning strategies. Consistent with these ideals, new policy statements articulate the vision and aims of a single coordinated higher-education system. For example, among others, the policy statements outlined in *A Programme for Higher Education Transformation* (Republic of South Africa 1997) seek to accomplish the following:

- facilitate horizontal and vertical mobility by developing a framework for higher-education qualifications that incorporates adequate routes of articulation, as well as flexible entry and exit points
- promote the development of a flexible-learning system, including distance education and resource-based learning founded on open-learning principles
- promote human resource development through programs that are responsive to the social, political, economic, and cultural needs of the country and that meet the best standards of academic scholarship and professional training

Ambivalence toward this force for flexible higher education was inevitable. Institutions of education had to come to grips with and apply the standards and principles of the NQF as they related to outcomes-based, modularized, credit-based programs. Education managers and teachers at all levels had to catch up with the new concepts and question the implications for curriculum. The buzz of seminars and workshops and the shuffle of directives, forms, and templates were inescapable. Reactions vacillated from resentment of a hurried and mandatory series of reforms to embracing new ways of diversifying curricula and removing barriers to student entry and success. Endless debates and disagreements arose about the difference between an outcome and an objective, a course and a module, the relationship between program credits and estimated number of hours of learning, guidance required and autonomy expected, and to what extent quality and flexibility can coexist.

Amid this interplay of principle and policy, certain areas of practice remain contentious. Multiple constraining forces have emerged, including traditional disciplinary specialization and summative assessment to

constrain flexibility in higher education. Curricula have been carefully insulated within the bounds of specific subject fields and disciplines rather than thematically organized across disciplines. Likewise, programs are generally designed with examinations and, to some extent, portfolios of evidence as endpoints rather than with recognition of prior learning as a starting point. It is not difficult to find reasons for these patterns of practice. The traditions of knowledge production and packaging, and the administrative design of access and exit points were structured to maintain the status quo associated with the privilege of higher education. At the same time, the capacity and resources required to implement reforms are constrained by a prescribed staffing and funding formula, parameters for program mix, rules of combination, and program duration.

*Recognition of non-formal prior learning:* Generally speaking, students can easily transfer their credits and formal qualifications from one institution to another, thus providing some flexibility of access. However, the recognition of non-formal prior learning (RPL) has been more problematic. The RPL initiative in South Africa has a unique and challenging agenda because it has to (1) remove the traditional barriers to education and support the transformation of society and (2) operate as an effective mechanism to encourage flexible lifelong learning.

Progress in the implementation of many policies has been very slow as a result of constraining forces, the most significant being the review process for RPL and its lack of credibility. Processes suggested in the RPL policies of many institutions require institutions to comply with external regulatory and statutory requirements. The implementation of RPL to enable adult students' flexible access to higher education is particularly problematic. For example, the processes take an inordinate amount of time—up to two years between the RPL application and the final decision. Some institutions have made progress in this regard by developing and implementing clear RPL procedures and creating a dedicated RPL unit rather than leaving the management of requests to individual teaching departments. Although RPL is slowly gaining credibility, the perception remains in many circles that it is a second-class avenue of gaining entry or credit. Thus, flexible access to higher education is constrained by public perceptions as well as by processes that are too slow.

*Labour-Market Demands*

Flexibility in higher-education academic programs emerges as higher-education institutions strive to fulfill their role as contributors to both academic scholarship and economic growth. In order to remain relevant to the labour market, universities make available program mixes that offer an array of options to students, allowing them to choose subjects across disciplines. Also, as an alternative to whole qualifications of a longer duration, a range of short skills programs has grown over the years. These options bring much-needed income to the institution while facilitating greater mobility and career opportunities for students. Furthermore, non-formal programs that are not intended to align with any particular qualification provide escape from the NQF framework that "locks" learning into pre-determined level descriptors that state the essence of expected outcomes at each level of study.

That said, quality-assurance regulations and requirements for providers of education and training also set rigid parameters for institutions regarding program mix, rules of combination, and program duration. This system offers negotiated flexibility, but the complicated administrative system of checks and balances is time consuming and can be debilitating, thus constraining flexibility.

*Subsidized Higher Education*

Despite some problems, South Africa is growing as a democracy. More students gain access to higher education than ever before. However, even though they are subsidized by the state, they still need to pay high fees. Traditionally, distance-education institutions catered to mature students, who studied to relieve boredom or to advance their careers, but today the student profile is changing rapidly. As distance learning offers a cheaper option to higher education, a growing number of school leavers enroll at UNISA.

Distance education offers some flexibility, but it brings challenges, especially for young school leavers. The most significant challenge is its foreignness as a concept, leading to both space and student-support needs. When deciding on a university, many potential distance-education students seem to look only at the fees rather than at the nature of the

education provision. The reality of independent study with the help of learning materials but without the face-to-face support of teacher and fellow students is not considered. The result is that UNISA's study centres around the country are filled with students studying, chatting, and doing what students do. The challenge to the physical logistics of the campuses is huge, and the desire for tutorial support enormous. While the will is there to provide such support, finding the best way to meet the needs of students remains elusive.

*Emerging Technology*

By the early 1990s, many conventional universities in South Africa had introduced some component of distance learning in their programs. This was a significant leap. Without having progressed through the first two generations of distance education, it was possible for a traditional institution to offer a blend of print material, face-to-face sessions, and online learning. Such openness, though driven largely by the advantages yielded by technology, showed a readiness to adapt and respond to a new context and culture of education. Still, the use of technology for teaching and learning did not mean that a face-to-face university automatically assumed the identity of an ODL institution (Morrow and Nonyongo 2003).

Student access to computers and the Internet, however, has constrained the potential for openness and flexibility. Third-generation ODL usually suggests a greater reliance on electronic media, but in our context, it suggests once again the need for more student support, more contact, and more flexibility of access to technology than ever before. In the Western world, the accessibility to computers, the Internet, and other media is taken as ODL's cornerstone. The promise, therefore, is that a student can access learning materials, fellow students, and lecturers at any time. The reality in developing countries is somewhat different: connectivity and bandwidth is limited and the costs of the technologies are high. In 2009, nearly 70 percent of UNISA students claimed to have access to a computer and the Internet, but further investigation revealed that only a fraction of them had home computers and that the Internet had to be accessed at their workplace, at study centres, or at Internet cafés.

## CONCLUSION

The policies of redress and equalization of opportunities have created some improvements in infrastructure and access to education. The flexibility and affordability of ODL, along with improved Internet connectivity, will continue to attract many students to higher learning. However, the tensions that exist between ODL and the idea of massification remain a challenge. Even as existing constraints are receiving attention, new drivers for greater flexibility are emerging.

The growing problem of poorly educated, unskilled, and unemployed youth is a threat to the ideals of social transformation. Dramatic changes to school curricula have been mooted in order to ensure that university entrants have the competences required to succeed. There are also calls for higher education to be made free, but whether the state will be able to fund such an enterprise remains to be seen. Flexible-education practices do offer hope for school leavers and graduates but cannot be expected to erase all the vestiges of the past. Social transformation in South Africa can be achieved, provided the constraints are addressed in time.

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## ABOUT THE AUTHORS

Milly Daweti started school at the age of four. Somehow, her parents had persuaded the principal that the young child was ready for school since she could read and count. That was a concession the school would never grant again. After obtaining a three-year teacher's diploma, Milly's teaching career was unavoidably linked to further studies by distance education through the University of South Africa (UNISA). This experience, coupled with involvement in various in-service teacher-development programs, intensified her interest in adult learning and quality learner support through curriculum and instructional design. An unfinished personal business agenda she must still tackle is the creation of a flexible work life. Milly is Head of the Quality Assurance Unit at PALAMA, the Public Administration Leadership and Management Academy of the Republic of South Africa. milly@mweb.co.za

Born in South Africa just before the start of the apartheid era, Jean Mitchell is happy to say that she has outlived it. Since 1970, she has worked as a teacher cum researcher in schools, teacher-training colleges, and universities, always trying to find the most flexible method for learners to succeed. At Vista University, she realized the potential and pitfalls of distance education to provide education to the disenfranchised and

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# 5 › Politics, Pedagogy, and Productivity as Drivers of Flexible Learning

CATHY GUNN

## THE CHAPTER IN THREE VERSES

With long-term investment, high levels of enthusiasm, and great expectations all focused on moving the flexible-learning agenda forward, it is time for a critical review of two long-unanswered questions: Why is it that far fewer faculty than anticipated are prepared to engage with flexible learning, and what barriers exist between strategic intent and the translation of flexible-learning principles into good educational practice?

A recent report from a prominent British organization that supports leadership in the use of information and communications technologies (ICT) in education notes that "policies can drive forward an agenda for change, but the real test comes at the point of use" (JISC 2008, 5). Answering these two questions is therefore critical to the national and institutional implementation of flexible-learning strategies.

In this chapter, I analyze these questions from the perspective of capacity development, and I use the findings from a study of long-term prospects for grassroots flexible-learning initiatives to propose some answers. While my context is New Zealand, these analyses apply elsewhere.

## WHY USE A CAPACITY DEVELOPMENT FRAMEWORK?

In *Planning, Implementing, and Evaluating Capacity Development*, Horton (2002, 2) describes "an organic process of growth and development by which individuals, groups and organizations improve their ability to perform their functions and achieve desired results over time." The process involves cycles of situation analysis and monitored change initiatives

(Tamas 2008). In the context of flexible learning, faculty and organizational development through action learning are key enabling methods, with the core aim being to identify and remove barriers to the achievement of strategic goals. The examination of different perspectives is important because the impact of strategic plans varies according to individual roles, priorities, and experience. It may not be possible to align all priorities of, for example, information-technology services, finance, and teaching; however, it is important at least to understand them.

For evaluating capacity-development initiatives, Horton recommends a holistic approach and flexible definitions of success. Tightly defined targets and quantitative measures, he argues, are unsuitable for the complex and innovative process of strategic change. The flexible-learning community knows from experience how difficult it is to predict outcomes when new ground is being broken (Mason 1998), so it's refreshing to find a structured method that considers it unnecessary even to try. The goal of organizational learning informed by the collective response to new initiatives is an integral part of any strategic initiative.

The capacity-development framework can be applied in many situations. It provided a useful basis for my recent study of flexible-learning sustainability factors, which yielded powerful insights into why many initiatives fail to meet expectations that seem, on the surface, to be reasonable and well supported (Gunn 2010). My situational analysis drew on three sources: the literature, researcher observation, and interviews with key practitioners. I aimed to review progress on key aspects of the implementation of flexible-learning strategies in New Zealand. The chief goal was to minimize speculation, get all stakeholders talking, and focus on the directions to which compelling, if somewhat obscured, evidence was pointing. I thus had to learn what an informed response to demands for flexible teaching and learning means in practical terms.

## THE SITUATIONAL ANALYSIS

Many national governments and most institutions have some kind of strategy to drive a flexible-learning agenda across the tertiary sector. In this context, the definition of *flexible* is any learning design or delivery

method that offers an element of choice of place, pace, or mode of study. It does not necessarily involve distance, and while the use of ICT is not mandatory, the word *flexibility* is often used synonymously with *e-learning*. Statements of strategic intent typically focus on widening access, accommodating the needs of a growing and diversifying student population, and, last but not least, articulating social-constructivist learning theories in course and curriculum design. In brief, the stated aim is to respond to changing demands from the market. A rather less explicitly stated intention is to ensure long-term viability of the prevailing institutional business model.

No doubt these are all worthy intentions. The literature is rich with research and case studies reporting successful implementation of flexible-learning principles in campus-based (e.g., Simpson and Anderson 2009; Gunn and Harper 2007) and distance learning (e.g., Meriosotis and Phipps 2000). A range of useful online tools, design models, and reusable resources for flexible learning has evolved in recent years. A notable culture shift is occurring, as many learning designs, software systems, and course materials are made available through open-source, Creative Commons, and share-alike licences. While this model may not please the accountants, it contributes to a growing body of knowledge and reflects the culture of collaboration and the service philosophy central to systems of public education.

With positive signals coming from faculty and students everywhere about the benefits of flexible learning, it would be easy to conclude that strategy implementation has already scored a major success. Yet most courses in New Zealand universities make minimal use of available opportunities beyond content-management and administrative functions. Commercial or open-source online learning-management systems have become more or less ubiquitous. However, their use is often restricted to accessing course documents, circulating notices, submitting assignments, and assessing students' work with basic online tools. While many creative flexible-learning designs depend on these systems, the truth is that most faculty are not exploiting that potential. The situation bears remarkable similarity to computer-assisted-learning developments since the early 1990s (e.g., Hammond et al. 1992; Gunn, Woodgate, and O'Grady 2005). The seemingly simple but penetrating questions remain: What are

the missing links between policy and practice, why have they proved so persistent, and what can be done to address them?

Part of the answer lies in the barriers identified at the practice level in a study of flexible-learning strategy implementation in six of New Zealand's eight universities. These fall into three general categories: politics, productivity, and pedagogy. The institutions' courses are mainly campus based, though many have integrated flexible elements. Specialized postgraduate subjects are increasingly available in flexible mode to accommodate students employed in professions. As institutions, these eight universities may not rank among leading innovators in the global trend toward flexible learning, though some individuals and groups of faculty do work at the leading edge. However, the universities support teaching and learning innovation in many practical ways. This scenario is common to many national contexts. How far these findings relate to others is up to the reader to decide.

*Political Barriers*

An important missing link between strategic intent and flexible-learning practice at the grassroots level is mutual understanding among people at different points on the continuum between strategic planning and educational practice. The cultural norm of devising strategy at the top of an organization and driving it downwards is useful in many respects, but where it often falls short in the context of flexible learning, or other significant educational change, is in its failure to foster grassroots involvement from the outset. This approach overlooks the value of drawing on the experience of those already familiar with developing flexible-learning programs through a process of experimentation, evaluation, and changed practice. Without this grounding, risky forecasts, sales pitches, and personal or political agendas may become the significant drivers.

Most institutions have committee structures, policy review processes, and management roles designed to facilitate multi-directional communication, but few seem to work very effectively in practice. It is difficult enough for information to filter down, and rare for it to filter up. Strategy implementation fails to overcome the first hurdle if what should be a shared vision is at best an imposed and only partially relevant one. At worst, the imposed vision may seem obscure and irrelevant to many key

players. People making important strategic decisions often do so from a partially informed perspective. Duke, Jordan, and Powell (2008, 2) note that "generally there are significant shortcomings in the capability of senior management teams in [higher-education institutions] to identify and exploit the full strategic potential of technology." Politically, strong players have significant power to influence. Leading practitioners may not be included in this group, and the average faculty member may not even be in the picture. If there is no shared vision to start with, how can strategy implementation proceed?

The distributive-leadership model described by Lefoe, Smigiel, and Parrish (2007) offers a practical way to overcome this barrier. Within this model, a strategy to increase educational leadership capacity (among other goals) uses action learning, mentoring, and new networks to promote mutual understanding across organizational levels. This largely successful way to facilitate strategic change was initially challenged by slow acceptance of networks that cut across hierarchical levels. There have been, however, positive signs of progress over time. Meanwhile, the conceptual approach, the objectives, and the strategies employed may be useful in flexible learning and other strategic change initiatives.

Beyond individual institutions, national policies and funding initiatives similar to New Zealand's ICT Strategic Framework (New Zealand Ministry of Education 2006) and eLearning Collaborative Development Fund (New Zealand Tertiary Education Commission 2003) support the trend toward increased flexibility. While these initiatives make a positive contribution, they also add a layer of complexity—in the former case, by setting goals without providing the means for their achievement, and in the latter, by providing seed funding with no support beyond the establishment phase. In principle, these are positive moves. In practice, they don't always work as intended if, for example, market signals are misread or projects stall at the dissemination stage.

To end this brief summary of political challenges to flexible learning on a positive note, the environment does become more supportive through experience. The same flexibility that is demanded for learning environments slowly filters through to organizational structures and systems that support such flexibility. Concepts of power and leadership are gradually shifting from individual to collaborative models. Such a culture

shift is significant for future developments. Even though people and organizations generally resist it, over time change is inevitable and finds its own equilibrium. One impact of new technology and the social change associated with it is a shifting locus of control in various parts of formal education systems. Regardless of politics, evolving pedagogy will persist as a significant driver.

*Pedagogical Barriers*

Experience shows that the pedagogical knowledge of capable teachers and/or learning designers in a supportive environment is the most effective driver of flexible learning at the level of practice (e.g., Lockwood and Gooley 2001). This is true whether or not a guiding strategy is in place. Collaboration with media developers and others may be involved, but is not prerequisite to success. This statement holds no surprises for anyone directly involved in the development of flexible educational practice. It may be less familiar to the authors of policy requiring all courses to have an online presence within a specified time frame: these policy-makers generally believe that flexible learning can thus be successfully implemented. A common outcome of such a policy-driven approach is the widespread use of a learning-management system as a repository for course materials and administration. While the convenience of online access is welcome, this result represents poor use of the pedagogical potential of even the most basic tools. Thus, conceptions of flexible learning that were formed in the process may limit the scope of further creative enterprise around teaching and learning.

Synergies between educational theory and practice, emergent technologies, and changing demands from learners produce the most notable and sustainable innovations. In an ideal situation, everyone involved in development and dissemination of flexible-learning practice is familiar with all these elements and is motivated and encouraged to experiment in order to find creative solutions to challenges arising in their professional practice context. Participants also need to see flexible learning as a practical way to meet these challenges. These conditions are currently not met as widely as is necessary to drive the flexible-learning agenda into the future. The amount of time and creative effort required acts, for some, as a deterrent to engagement.

Given these barriers, what does make flexible-learning initiatives pedagogically successful and practically sustainable? Typically, successful implementation starts with a problem that acts as a catalyst to innovation. In one common scenario, there is too little time or too many students for established educational designs to work in a traditional face-to-face setting. Many cases demonstrate how integrated online tutorials, formative peer- or self-assessment simulations, and/or discussion-based activities may overcome this problem. Students can spend different amounts of time and use these activities in flexible ways to suit their own perceived learning needs and preferred styles. In solving a problem that is both practical and pedagogical, learner autonomy and choice are also increased.

*Productivity-Related Barriers*

Anticipated increase in productivity is another major driver of flexible learning, perhaps more so than is acknowledged at the strategic level. Where this objective is covert and/or unrelated to teaching and learning enhancement, it can hit barriers at the level of practice. An extreme example is projected economies of scale from large, online courses taught by low-cost graduate students. Many initiatives geared toward productivity gains have failed spectacularly and have resulted in the loss of significant investment that would have been well used by better-grounded flexible-learning initiatives. The few that have survived tend to serve niche rather than mass markets.

Economies of scale are essentially good for flexible learning, as examples from both single institutions and national sectors show. For example, degree programs offered by consortia support specialization and avoid replication. National funding initiatives benefit from cross-institutional collaboration and production of freely available resources. Many teaching departments and individual faculty have produced creative flexible-learning solutions to manage the demands of increasing workloads, student numbers, and diversity. Practical and pedagogical aspects often overlap. Thus, the peer and online assessment, tutorials, discussions, and simulations noted in the pedagogy section above serve the dual purpose of enhancing both learning and productivity for teachers, learners, and institutions. Online enrolment, gradebooks, and communication tools increase efficiency across the system, provided they are well designed

and effectively used. Many other benefits accrue from the convenience of online access, as instant feedback, open communication, and interaction grow to support teaching, learning, and administration.

## BRIDGING THE GAPS

It is clear from the evidence summarized here that many positive steps have been made toward answering the opening questions: why is it that far fewer faculty than anticipated are prepared to engage with flexible learning, and what barriers exist between strategic intent and educational practice? The answers change over time, and my conclusions reflect the current situation.

From a faculty member's perspective, incentives and rewards for engagement with flexible learning may have no tangible link to strategic initiatives. Investment of time and resources carries an opportunity cost that needs to be acknowledged through processes such as promotion, continuation, and awards. Some faculty remain unaware of what support is available and how to access it. Better marketing and communication is one possible remedy.

For the drivers of strategic change toward flexibility, there is a management expectation that investment will lead to desirable outcomes, yet investment decisions are often misaligned with the demands of practitioners. The incentives, checks, and balances used in another area of core business, research productivity, are not applied to flexible or other forms of teaching and learning development. The result is that policy documents related to effective and creative teaching do not always reflect what happens in practice.

Positive action and new lines of communication need to connect these unproductively separate strands of flexible-learning development. Integration into institutional systems and structures is the simple answer. What this means in practice is proving slow to be defined and to permeate institutional culture. The meaning also varies across institutional contexts. The capacity-development framework offers a suitable conceptual approach. However, creating the flexible organizational structures and levels of responsiveness required by the framework remains a challenge.

## CONCLUSION

Strategic intent is a powerful force for change, but the evolving demand for flexible teaching and learning environments is what really determines the direction and the nature of response. The statement that "the real test comes at the point of use" (JISC 2008, 5) has an unspoken implication that the change may be something other than what was anticipated. New technologies prove this point consistently, as end users devise useful applications that the developers never dreamed of. Education systems are well placed if they can read signals and respond in an appropriate and timely manner to changing demand from the environment. Such is the law of nature for successful organizations, supported by grounded models and compelling evidence: flexibility, however elusive, is key.

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## ABOUT THE AUTHOR

Cathy Gunn was enjoying life as a business journalist-turned-travel writer when the publishing industry was taken over by computers. Determined not to let technology make her redundant, Cathy switched to studying computer programming and educational-software development. This was no trivial task back in the Dark Age before usability and user-centred design shone light on the virtual landscape. Too many 4:00 a.m. sessions looking for bugs in her code led Cathy to another change of direction. Higher degrees in computer-based learning led to faculty development and teacher education, and eventually to a leadership role in e-learning and related organizational development. The common thread is helping people to make well-informed choices about the use of new technology to enhance teaching and learning. She is Head of the eLearning Group and Academic Adviser at the University of Auckland in New Zealand. http://cad.auckland.ac.nz/index.php?p=staff_page&staff=cgunn

# 6 › Cultural Perceptions of Flexibility in Asian Higher Education

COLIN LATCHEM AND INSUNG JUNG

Discussing flexibility in Asian higher education reminds us of the Indian legend of the six blind men and the elephant. As retold by the nineteenth-century American poet John Godfrey Saxe, the story begins:

> It was six men of Indostan
> To learning much inclined,
> Who went to see the Elephant
> (Though all of them were blind),
> That each by observation
> Might satisfy his mind.

The poem recounts how each man in turn touches part of the elephant, proclaiming it to be a wall (the hide), a spear (the tusk), a snake (the trunk), a fan (the ear), a tree (the leg), and a rope (the tail). It concludes:

> And so these men of Indostan
> Disputed loud and long,
> Each in his own opinion
> Exceeding stiff and strong,
> Though each was partly in the right,
> And all were in the wrong!

The moral of the story:

> So oft in theologic wars,
> The disputants, I ween,
> Rail on in utter ignorance

Of what each other mean,
And prate about an Elephant
Not one of them has seen!

(The complete poem is available online.)

Flexibility can be defined as a willingness to change and the ability to bend without actually breaking—characteristics that Asian universities display, but to different degrees and in different ways. As a concept, flexible learning is closely linked to e-learning, which, again, signifies different things in various Asian contexts.

Altbach (2004) observes that Asian higher education operates within an international knowledge network and is therefore influenced by Western curriculum and pedagogical developments. It is also undergoing massification and becoming more diversified and flexible in response to socio-economic development needs. However, in embarking on expansion, innovation, and reform, Asian universities look not only to Western ideas and practices but also to their own traditions, cultures, and internal realities, so *flexibility* may mean different things in different contexts. India's Indira Gandhi National Open University and the Open University of Sri Lanka may interpret it as operating open admissions. For the Open University of Israel, *flexibility* may mean allowing students to design their own programs of study across disciplines. The Open University of Japan may regard itself as flexible in its use of open-learning resources. Cyber universities in the Republic of Korea (Korea hereafter) may see themselves as flexible in individualizing their courseware. The conventional universities may see themselves as becoming more flexible in offering curriculum choice and using information and communication technology (ICT).

## DRIVERS AND CONSTRAINTS

The drivers of and constraints on flexibility in Asian higher education vary according to the socio-politico-economic milieu, the culture, and the available technologies.

*Socio-politico-economic Milieu*

The main driver of flexibility in Asian higher education is the need to achieve rapid expansion while constraining costs. The growth in higher education is far greater than elsewhere in the world, but while Asia has two-thirds of the world's population (excluding the high-income countries—Japan, Singapore, Taiwan, and Korea), it has only 3 percent of the global wealth. Most Asian countries cannot afford to accommodate the vast numbers seeking entry into the conventional institutions. As a consequence, Asia has the world's largest number of distance learners; seventy open universities; mega-universities such as the Open University of China, India's Indira Gandhi National Open University, and Turkey's Anadolu University, collectively catering to millions of students; and an ever-increasing number of public and private dual-mode institutions, virtual/cyber universities, and international online providers/consortia. Demand for entry at some of these institutions—for example, Anadolu University—is overwhelmingly from school leavers unable to enter the conventional universities. By contrast, about 50 percent of the distance students enrolled with the Open University of Japan, 70 percent of those at Pakistan's Allama Iqbal Open University, and 95 percent of those studying at Indonesia's Universitas Terbuka are mature, employed students.

Students in Western countries who opt for off-campus or online study generally do so because of the flexibility factor. Most Asian distance-education students would prefer to study face to face at conventional institutions, but they have no choice. They can take heart from the fact that the pressures to increase higher-education participation are resulting in more flexible admissions. China's Radio and Television Universities and the Open University of Japan require students entering degree programs to pass the national higher-education entrance exams, but they waive this requirement for non-degree programs. Applicants for Turkey's Anadolu University must pass the university-entrance exam, but their grades can be lower than the cut-off points set by the conventional universities. Entry requirements are also relaxed for some degree programs at Indira Gandhi National Open University and the Open University of Hong Kong. The University of the Philippines Open University takes account of the work experience of applicants lacking the minimum entry scores. The Open University of Israel (OUI) waives matriculation or certification from

other educational institutions, and having gained credit for clusters of undergraduate courses, students can continue studying through OUI or another university.

Distance education can be used to provide for learners in the furthest corners of vast countries such as China and India, and for high-density populations in cities such as Hong Kong and Tokyo. Capacity to do this varies across Asia. Countries such as Korea, Singapore, Malaysia, and India lead the way; the West Asian countries are only just beginning to adopt these methods; and countries such as Mongolia and Myanmar are lagging in provision.

Another driver of flexibility in higher education is the move away from government control. Universities in Malaysia, Thailand, Indonesia, the Philippines, Vietnam, and Singapore are no longer directly administered by the government. Responsibility for curriculum, pedagogy, e-learning, and inter-institutional collaboration has been delegated to higher-education councils or individual universities. In other countries such as Taiwan, public-university presidents are no longer Ministry of Education appointees but are selected by the universities. In Japan, with the aim of increasing competition and enhancing standards, the Ministry of Education, Culture, Sports, Science and Technology (MEXT) requires the national universities to be "independent corporations," responsible for their own budgets and staffing. In exchange for this administrative freedom, their funding is dependent upon performance. Also embracing market-driven competition policies, the South Korean government encourages the universities to establish strategic partnerships with the private sector and the world's leading research universities: for example, between the Korea Advanced Institute of Science and Technology and Massachusetts Institute of Technology, and between Seoul National University, Tokyo University, Peking University, and Hanoi University.

Some Asian governments still exercise greater control over their universities than do Western governments, and the adoption of more flexible-learning systems often depends upon legislative change and protracted negotiations with bureaucracies. Vietnam's Hanoi Open University cannot offer any of its courses without the approval of the Ministry of Education and Training. In Japan, MEXT only authorizes the Open University of Japan and forty-two universities designated as "correspondence institutions" to

offer programs without face-to-face components, and conventional universities are only permitted to provide up to sixty of the required 124 credits through distance learning (Latchem and Jung 2010).

*Culture*

It is difficult to generalize about Asian cultures because they are shaped by so many different belief systems, physical geographies, and socio-economic circumstances. Moreover, countries once subject to Western colonialism have hybrid or bi-cultural frameworks, and globalization is accentuating the intercultural process.

Hofstede and Hofstede (2005) developed five cultural-dimension rankings to explain differences in behaviour between people in different countries. These are power distance (acceptance of inequality by both leaders and followers); individualism (people standing up for themselves and expressing personal viewpoints); masculinity (distribution of roles by gender); long-term orientation (valuing thrift and perseverance); and uncertainty avoidance (unease in ambiguous or unstructured situations). Most Asian cultures are regarded as high in power distance and low in individualism, but there the similarities end. Japan is considered high in masculinity, while Korea and Thailand are seen as low. China and Hong Kong are high in masculinity and low in uncertainty avoidance, whereas Malaysia is high in uncertainty avoidance and relatively low in masculinity. Korea and Japan are high in long-term orientation, but the Philippines is low in this dimension. It is important to use Hofstede and Hofstede's model with some caution, while recognizing that introducing more flexible management systems, organizational relationships, and teaching and learning methods may run counter to some of the accepted orthodoxies of Asian countries.

Using pedagogy as an example, Asian learners are more familiar with the transmission model of education than the kinds of interactions and challenges to thinking in Western-style student-centred, constructivist flexible learning. The teachings of Confucius held that the teacher's role was to transmit knowledge and the learners' responsibility was to accept and learn everything the teacher taught. In the Islamic world, the time-honoured duty of the teacher has been to teach the text of the Qur'an, the sacredness of which renders independent learning inappropriate. In

India, Indonesia, and the Philippines, the term *guru*—which in Buddhism, Sikhism, and Hinduism signifies one with great knowledge, wisdom, and authority—is widely used to mean teacher. So, not altogether surprisingly, many Asian students prefer to faithfully follow the teacher or text, and value learning that involves memorization, sequenced repetition, structured review, and closure-orientation (Zhenhui 2001). They are also often reluctant to question or express viewpoints on what is being taught. This may be attributable to the "collective" nature of Asian cultures, which leads to an aversion to public disagreement or the learners' concern that they may have insufficiently mastered the content. At home and school, they have been taught to "think one more time before talking"; as they say in Korea, "Even a fish wouldn't get into trouble if it kept its mouth shut."

Asian cultures are also described as high-context (Hall 1992). Communications in Asian cultures are less direct and assertive than in the low-context Western cultures. Low-context cultures rely on the spoken and written word to convey meaning. In high-context cultures, meaning and context are equally important and non-verbal communications play an important role. This is why so many so-called e-learning programs in countries such as Japan, Korea, and China take the form of television broadcast, streamed video, and DVD-recorded or video-conferenced lectures. Being able to see and hear the teachers, they feel less deprived of their teachers' academic and social presence.

E-learning serves a different function in Saudi Arabia, where women can never be seen unveiled in public by men. In all universities save the new King Abdullah Science and Technology University, male and female students study on separate campuses and the use of video conferencing and online learning enables female students to see, hear, and interact with the male lecturers while remaining hidden from their gaze and that of their male counterparts.

A combination of the power-distance factor, pressures of time, and large distance-education classes leads many Asian lecturers to ignore the interactive capabilities of ICT and to repackage their traditional lectures online. As the World Bank (2008) observes of the Arab world (although the observation applies equally well in other parts of Asia), teacher-led instruction is considered "quality education," and ICT simply a means of information transmission.

The above observations indicate why Western concepts of flexible learning—providing choice in the what and how of learning, varied learning environments, and opportunities to share ideas with others through discussion boards, chat rooms, and so on—force the Asian learner into radically different and sometimes discomfiting learning environments. For example, Al-Harthi (2005) found that Arab distance-education students in the United States liked the anonymity of online learning but still expected their teachers to define the rules and procedures, and to initiate interactions; they were reluctant to make unsolicited contributions or to ask for clarifications, and in the absence of teachers, they could abstain from learning and postpone assignments.

Given the collective nature of Asian cultures, it is important to ensure a sense of "teaching presence" through well-presented and clearly structured content and of "social presence" through interaction with tutors and other students. Belenky et al. (1986) distinguish between "connected knowing," an appreciative, empathetic, sharing, non-confrontational style of learning, and "separate knowing," a detached, impersonal, objective, critical style of learning. Asian learners prefer the former, so it is important to foster a sense of community and encourage small-group learning. Some Asian institutions manage to achieve this despite their large enrolments and limited numbers of tutors by encouraging voluntary study groups. The Korea National Open University has over seven hundred such student-formed groups, and more than 40 percent of KNOU students participate in these. Meeting weekly for two-hour evening sessions, they work through material prepared by group members, more advanced students, graduates, or lecturers, thus gaining a feeling of togetherness and improving motivation, confidence, retention, and performance (Jung et al. 1995).

Cultural differences may also be reflected in the amount of non-work time people give to the various media. According to the NOP World Culture Score™ Media Habits Index (2005), the global weekly averages are: television viewing, 16.6 hours; listening to the radio, 8.0 hours; reading, 6.5 hours; and non-work-related computer and Internet usage, 8.9 hours. At 22.4 hours a week, the Thais are the world's most avid television viewers. Indians spend more time reading than anyone else in the world, averaging 10.7 hours per week, while the least partial to reading are the Japanese

(4.1 hours per week) and the Koreans (3.1 hours per week). The Chinese spend the least amount of time listening to the radio (2.1 hours per week), and neither is radio especially popular with the Koreans and the Saudis (3.0 and 3.9 hours per week, respectively). The Taiwanese spend the most time on their computers, averaging 12.6 hours per week, closely followed by the Thais, at 11.7 hours per week. In selecting media for flexible learning, it may be advisable to consider these different dispositions.

Some cultures also seem more ready to adapt and change than others. For example, the South Korean government has been exceedingly proactive in encouraging and supporting new cyber universities, university consortia, and e-learning, and, as a consequence, "virtual learning" is entering the mass adoption stage (Bonk 2004). By contrast, Japan, a country that outwardly appears to have much in common with Korea, has largely failed to embrace education reform and e-transformation because the openness, flexibility, and bottom-up approaches needed for these are incompatible both with the bureaucratic regulatory approaches of the Japanese government and with the hierarchical tendencies and opaqueness of the universities (Bachnik 2005; Latchem et al. 2008).

*Technology and Access*

In East, South, and Central Asia, the overall Internet penetration rate as a percentage of the population is 14 percent compared with 21.9 percent in the rest of the world. However, the 2000–2008 overall growth rate in Internet usage was 363.4 percent compared with 255.9 percent in the rest of the world. Some of the growth rates—for example, Vietnam's 9,979.8 percent and Pakistan's 12,969.5 percent—bode well for the future. The comparable penetration rate in West Asia is 21.3 percent, with the 2000–2008 usage growth rate of 1,176.8 percent. However, enormous variation exists between countries. Internet penetration rates for Korea and Hong Kong are around 70 percent, but in Bangladesh and Iraq, they are only 0.2 to 0.3 percent. Also, some users have broadband access, while others only have dial-up.

It is one thing to have the necessary infrastructure but quite another to have achieved a state of what the Economist Intelligence Unit (2008) terms "e-readiness"—that is, the preparedness to adopt, exploit, and make changes to maximize the potential of ICT—and "e-learning

readiness"—the extent to which countries and their educational systems utilize ICT. The EIU finds that the strong leadership displayed by governments in Asian countries such as Hong Kong, Singapore, and South Korea is propelling them upwards in their e-readiness world rankings. In contrast, despite its hi-tech reputation and world-class ICT infrastructure, the governmental and institutional conservatism and rigidity of thinking noted earlier are leaving Japan behind in e-transformation (Latchem et al. 2009).

Western Asia has been similarly slow to move into e-learning. Khafagi (2004) attributes this to the problems and high costs of Internet and broadband connection and the lack of instructional-design expertise. These conditions also apply in many of the poorer, socially disadvantaged, and remote regions of Asia. Cultural mindsets also explain adherence to inflexible modes of teaching and learning. For example, in Nepal and Bhutan, there is still a strong preference for traditional modes of teaching and learning, as well as suspicion about the quality and status of open and distance learning (Rennie and Mason 2007).

Asia has over one billion of the world's 2.7 billion mobile phone users and the world's fastest growth in subscribers. Many Asians, especially the younger generation, have advanced skills in using mobiles, personal digital assistants (PDAs), short message service (SMS), tweeting, and social networks, all of which offer new means of providing flexible learning. In their trial use of these technologies, institutions such as the City University of Hong Kong, Shanghai Jiao Tong University, and University of the Philippines Open University have found that students often prefer m-learning (mobile learning) to personal computer-based learning and that PDAs and smartphones can enhance student performance. Mobiles are also a readily accessible, inexpensive, and reliable means of providing flexible student-teacher contact in countries like India where the postal systems can be slow and unreliable, and computers and landline telephones are too costly and inaccessible. Given the popularity of and the pioneering work in exploiting mobiles, iPods, and PDAs, Baggaley (2007) surmises that Asia may very well become a world leader in m-learning.

The growing popularity of learning objects and open courseware is another indicator of flexibility in Asian higher education. Asian universities are members of the OpenCourseWare Consortium (www.ocwconsortium.org),

and national initiatives are under way in co-developing and sharing Web- and video-based courseware. For example, Universitas Terbuka, Sukhotai Thammathirat Open University, Allama Iqbal Open University, the International University of Cambodia, the Open University of Hong Kong, and others are developing a digital depository of learning objects for sharing among Asian institutions.

## CONCLUSION

Flexibility is evident in Asian higher education but has differing realities according to culture and geography, and whether the view is top-down or bottom-up. Westerners may see video conferencing used to overcome gender separation on Saudi campuses as a symptom of denying women's freedom. In the Kingdom, it is taken as a sign of government commitment to providing better higher-education opportunities for females. Distance-education students in Western cultures may find all the ideas and information they need in the course texts and may consider "talking head" educational television boring and superfluous to their needs. Asian students may find televized and video-conferenced lectures essential to their understanding of the course content and the lecturer's expectations.

The fable of the blind men and the elephant teaches us that people perceive phenomena in different ways, ways that may or may not be correct. It also reminds us that we can gain from seeing things as others see them and should not be blindly attached to one set of perceptions. Every culture needs to define flexibility within its own philosophical, theoretical, and operational framework, but it also needs to be open and sensitive to cross-cultural issues.

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## ABOUT THE AUTHORS

After naïvely believing that audiovisual aids and programmed learning held all the answers, and later, that the theory and practice of educational technology encompassed everything, experience showed Colin Latchem that change takes longer than anticipated, selecting the right technologies/methodologies is akin to hitting moving targets, and success is never guaranteed. His work as manager, consultant, and researcher in open, distance, and e-learning in the UK, Australia, and around the globe has helped him to realize that the inherent strengths and weaknesses of each means of flexible learning, the kinds of teaching and learning the students are accustomed to, and the ever-present organizational and cultural factors need to be fully comprehended and considered. Forty years before

the mast—and Colin still has to warn himself about going overboard! http://cde.athabascau.ca/faculty/clatch.php

Teaching moral education in the 1980s, Insung Jung was frustrated by the answer to every moral question being set down in the textbook, the children having only to memorize these answers to pass their exams, and the boredom and bad behaviour displayed whenever she tried something different. So she took these kids outside to assess "good" and "bad" behaviours in the general public, asked them to interview people on ethical matters, played television dramas presenting moral dilemmas in class, and got them to present their findings in various media. Immediately, she found that the children were giving serious thought to moral issues, discussing issues beyond the set text, and coming up with some exciting, original thoughts. It was this experience that triggered Insung's lifelong interest in flexible learning. She is a Professor in Education, Media and Society at the International Christian University (ICU) in Tokyo, Japan. http://epiaget.com/

# 7 › Openness and Flexibility in New Zealand *Victories and Challenges*

MARY SIMPSON AND BILL ANDERSON

Openness in higher education relates to institutional practices; it describes a continuum along which institutions, to varying degrees, adopt practices that encourage access to and participation in education. In his address at the charter ceremony of the UK Open University, Lord Crowther (1969) defined an open institution as one that is open in regard to people, place, methods, and ideas. This characterization of openness as an institutional phenomenon should be complemented by a consideration of the processes of teaching and learning. To do this, we turn to the concept of flexibility. Tight (1996, 97) discusses flexibility in terms of learning opportunities that optimize learner autonomy and the process of learning. To us, as experienced distance educators, flexibility exists, for instance, when learners can control the order in which topics are studied, make decisions about the learning goals that are important to them, and have input into assessment tasks they undertake.

Our ideas about the practices of openness and flexibility in higher education have been shaped, buoyed up, and at times almost destroyed by our experiences in two settings. We have worked in universities on developing programs to make teacher education available to anyone, anywhere in New Zealand. We have also worked in professional communities to help create institutional and national contexts that support the notion that education should be offered to people anywhere at any time.

The New Zealand context has many features conducive to the development of openness and flexibility. It provides an accessible government; a relatively small number of major tertiary institutions, all largely publicly funded, with educational policies that reflect the international trend toward the promotion of lifelong learning; and a history that recognizes the value of and need for the flexible provision of education.

Some factors, however, have served to limit engagement with openness and flexibility: the higher-education system is strongly shaped by government policy and funding frameworks; research is, through funding mechanisms, seemingly prioritized over teaching; institutions create unhelpful systemic rigidities as they mature; and although the national postal infrastructure is superb, the digital infrastructure is wanting. This is the context in which we have carved out our ideas about openness and flexibility in higher education and that, along with immersion in related literature, continues to shape those ideas and how we put them into practice. We now consider the four features mentioned above—government frameworks, teaching and research activities, institutional policies, and the digital environment—that have an impact on flexibility and openness and that support or impede the movement toward enhanced access and participation in higher education.

## THE ROAD TO OPENNESS AND FLEXIBILITY IN EDUCATION

### *Government Frameworks*

Institutions operate within a national policy and funding framework that shapes, enables, and constrains. Government funding of public institutions provides a mechanism for some control, especially when that funding is tied to specific initiatives. Government policy sets broad national-interest goals for the higher-education sector.

The New Zealand context comes with a historical attachment to openness, evidenced by the emphasis on provision of access to education. In 1939, Peter Fraser, then the minister of education, announced the government's vision: "The government's objective, broadly expressed, is that every person, whatever his level of academic ability, whether he be rich or poor, whether he live in town or country, has a right, as a citizen, to a free education of the kind for which he is best fitted, and to the fullest extent of his powers" (Fraser 1939, 2). Despite the gender-specific language typical of the time, this commitment extended across the reach of the education system.

The commitment seems to continue in New Zealand and is still quoted by ministers of education. The most recent government strategy for higher

(tertiary) education discusses educational opportunity in terms of access and achievement, and calls for success for all New Zealanders through lifelong learning (Office of the Minister for Tertiary Education 2007). Higher education of any form is open (but not free) to all New Zealanders over the age of twenty. Support at a national level of strategy is a necessary part of a climate of openness in higher education.

Even where policy supports openness, however, implementation may create barriers. We recall an early battle over public funding of a distance teacher-education program. At that time, funding for all university distance courses in any subject was set at a single rate. Funding for the equivalent on-campus program had an additional component for costs related to field experience. That extra field-experience component was not added to the funding for distance students. Distance students, we were told, would be supported but were not consumers of the same level of resources as on-campus students and would be funded accordingly. As Butterfield (1999, 5) noted, "There is also little, if any, understanding amongst policy makers about the different cost structures underpinning quality open learning. Too many seem to think that simply broadcasting or putting courses on the Internet will suddenly enable thousands of students to access . . . education."

*Teaching and/or Research*

Teaching's role within the core activities of a higher institution has been diminished in the past decade in comparison with research. In a number of countries, research-assessment exercises are regularly undertaken, and resources are allocated according to the results of those assessments. Such exercises, with their attached funding and "bragging rights," play a significant part in shaping institutional policies and structures, as well as influencing how academic staff understand the relative importance of their roles.

In New Zealand, the net effect of research-assessment exercises has been to alter academic staff's perceptions of the relationship between teaching and research. Morris-Matthews and Hall (2006) surveyed staff at one New Zealand university and reported that since the Performance-Based Research Fund (PBRF) exercise was implemented in 2003, 27.8 percent of academic staff reported a decreased emphasis on teaching. None reported

an increase. In Australia, similar research (Teaching-Research Nexus 2008) shows that university academic staff see learning and teaching as undervalued as a result of more funding and prestige attached to research than teaching, and of promotion in universities primarily based on the amount and quality of research rather than excellence in teaching.

Valuing teaching as an activity must be foundational in the development of flexible approaches to learning. Institutions cannot afford to allow the development of polarization around teaching and research as separate activities. Devaluing teaching devalues students and the importance of adults' participation in education. Institutional and national policies that promote the integration of teaching and research must be pursued as a basis for revaluing teaching and learning, and providing a foundation for flexibility in education.

*Institutional Policies and Frameworks*

Institutions have always recognized that they have a role to play in encouraging students to engage in study. There is, however, a distinction between institutions acting to help students assimilate current institutional values and practices, and institutions acting to change themselves to accommodate the increasing diversity of students and the changed circumstances under which student learning now occurs. Thomas (2002, 431) argues that "institutional habitus" is a useful concept in understanding this difference, explaining it as "more than the culture of the educational institution; it refers to relational issues and priorities, which are deeply embedded, and sub-consciously informing practice."

This relational viewpoint aligns closely with a more nuanced understanding of the concept of flexibility. Zepke and Leach (2005, 47) speak of the conceptual change as a turn to the discourse of adaptation, "where institutions change to accommodate diverse students" rather than where students are integrated within institutional norms. They suggest that "central to the emerging discourse is the idea that students should maintain their identity in their culture of origin, retain their social networks outside the institution, have their cultural capital valued by the institution and experience learning that fits with their preferences" (54). Nowhere is the importance of this more evident than when institutions are faced with students from varied cultural backgrounds.

In New Zealand, Maori participation in higher education serves to exemplify the importance of this relational viewpoint. Noting that governments and institutions might value different outcomes from students, a report from Te Tari Matauranga Maori (2007, 374) argues that

> especially for Maori, the concept of "success" or "achievement" should not be presumed to equate with indicators the education system uses, such as attendance, passing courses or gaining high marks. Students may not define their goals in terms of attending throughout a programme of study (viewed as retention) or the receipt of a qualification (seen as achievement) because they may have alternative objectives.

Flexibility may be easily limited. The institutional suppleness that is required for flexibility to be the norm may be missing in "middle-aged" universities, where practices have often become rigid. Failure to recognize and account for the diversity that today's students bring to institutions may arise in those institutions that have been more familiar with a homogeneous student body.

*Digital Technologies*

The advent of the online world seemed to hold great promise for enhancing flexibility and openness. This promise arose from early arguments for the democratic nature of the online world, the power of the natives-immigrants metaphor (Prensky 2001), and the rapid growth in online courses through the past decade. For some, it has been realized. Students taking online classes in the United States report valuing the flexibility that such classes afford (Salaway and Caruso 2008). However, the digital world affords just as many difficulties as it does solutions to questions of openness and flexibility.

Three major factors continue to differentiate students and serve as barriers to openness and flexibility through use of digital technologies: access to technology, capability of the technology being used, and individual competence with technology. Distributions around "norms" of access, capability, and competence are to be expected. Some students are bound to have poorer access, or equipment with more limited capabilities, or less competence with technology, or any combination of those

three factors. For example, in New Zealand in 2007, 31 percent of Internet users still accessed the Internet by dial-up (Bell et al 2008). These factors inevitably impact on both the openness and flexibility possible in education based on online delivery.

Overcoming the access, capability, and competence barriers may be an important goal, but it will not necessarily ensure openness for all. In 1985, David Perkins argued that technology places opportunities at our fingertips but asked whether people actually take advantage of these opportunities. The answer is "sometimes," although for some groups in society, the answer is "no." Clearly, as regards the online delivery of education, "those who are less privileged will not find advantage here. . . . The issues facing online education are those that have faced all forms of education—power, privilege and interest" (Anderson 2005, 175–76). And it is power, privilege, and interest that work against flexibility and openness.

Higher-education institutions are recognizing that they no longer control access to knowledge. The advent of Internet-based open educational resources and open courseware initiatives ensure that course material is freely available online. What institutions do control is access to accredited qualifications and the experiences that surround formal learning. As long as such things are desirable, institutional policies and frameworks will continue to impact on student perceptions and experiences of openness and flexibility.

## INSTITUTIONAL CHALLENGES

Why does high-quality open and flexible higher education remain so elusive and seemingly so hard to achieve? The success of the single-mode Open University (UK) has been emulated around the world by other national open universities, but achieving that success across the range of conventional, dual-mode higher-education institutions has been more problematic. Many have followed the route of e-learning, pointing to online distance education as a key means to attaining open, flexible delivery. We believe that three factors—knowledge of history, a focus on programs, and an understanding of adult learners—should ensure that the potential of openness and flexibility through online distance education will be realized.

*Leveraging Knowledge of History*

History is important. Knowledge of the field of open and flexible higher education and of developments that have brought us to the present must guide us toward quality provision. Although it is not the only contributor, we see distance education as having played a major role in developing openness and flexibility of higher education in New Zealand. Distance education is not a recent development, nor is it a static field. It has evolved from correspondence methods in the nineteenth century through to the development of the World Wide Web and on to intelligent flexible learning (Taylor 2001). Each generation of distance educators has, or should have, taken from the previous one and built on it, developing the concept of openness as it relates to people, places, methods, and ideas, and taking into account principles of learning and teaching.

Engaging in distance education is an especially difficult challenge since its use crosses all academic disciplines. The physical separation of teacher and learner and the unfamiliarity of distance education to on-campus, classroom-bound educators impede progress toward recognizing the potential for more flexible ways to help adults learn. It is understandable that academics may not see themselves as distance educators or even be aware of the field, yet many of them often enthusiastically embrace the use of the latest fashionable modes of delivery to reach students. Enthusiasm is desirable and may lead to innovation, but an informed response built on past lessons is a necessity (Burge 2008).

The development of networked technologies as a tool for learning illustrates the importance of understanding history. While networked learning is undoubtedly a most exciting and potentially transformative development for higher education, its use is not often founded on understanding incremental growth based on past lessons. This failure is one reason why higher educators in dual-mode institutions fail to realize the potential for creating flexibility alongside interactive, media-rich, collaborative, and personalized learning experiences for all learners.

In addition to not using the lessons of history, we propose two key reasons why realizing the potential of distance-mode flexible education is difficult in conventional dual-mode institutions. First, administrators and teachers often do not understand the lengthy course-development time needed, and they tend to focus on individual courses rather than on

the conversions of full programs to flexible formats. The second difficulty is the minimal understanding of the teaching and learning needs of busy adults who study while working and raising families. Both difficulties must be addressed at the institutional level, not at the individual faculty member level, if our own experience is any guide.

*A Program-Based Focus*

Having a program-based focus and supporting teachers in working together doesn't fit comfortably into the organizational structures that we see in most institutions of higher education. Such institutions often channel resources into discipline-based units where the focus is on individuals, their research, and the courses they teach, not on the programs they teach in. Teachers and course developers (where they exist) may get many forms of technical and pedagogical support individually, but planned institution wide systemic support is often lacking.

New patterns of curriculum planning and development are needed if conventional institutions are to move toward openness and flexibility. More of us teachers have to commit to and fight for program-focused developments and the understanding that program development is complex and multi-layered. Change is threatening. Program-based change threatens the individual-faculty-member basis of course ownership that is well established in higher education. Developing flexible course materials collaboratively and on a program basis means that work that has been personal is suddenly public and open to peer scrutiny. All participants in change have to understand their contribution to and locations within the change process. Strategically, units within dual-mode institutions would have to interact and work toward a shared outcome. That is not always common practice. Program-focused development and teaching-model changes across institutional units are significant challenges.

*Adult Learners*

Understanding adult learners is essential. It is not always the case, however, that such understanding shapes teaching and material-development approaches. The student body in higher education is fragmented. In New Zealand, for example, we are seeing increased numbers of first-generation higher-education students, more part-time students, and greater numbers

of mature students engaged in higher education. Adult learners bring wide and disparate knowledge and experience to their learning. Their backgrounds need to be valued and used to shape teaching approaches and teaching materials. Accepting that adults bring idiosyncratic and hard-won knowledge and experience also means accepting that a teacher is not the sole source of knowledge in the class and is not necessarily the only one in a class capable of teaching. Adult students also bring experience of formal learning, and it is not always positive. They may have developed strong, but not always helpful, preferred styles of learning and preferences about types of material.

Adult students are often highly motivated and may have clear learning goals, but they also bring constraints that present serious challenges for their teachers. They are likely to be time-poor, multitasking in the realms of work, family, and study, and expecting high returns on their investment in learning. Kramarae (2001, 29) notes that many women undertaking distance study "serve a first shift at work outside the home and a second shift as primary caretakers of family members. The only way they can accomplish a third shift—their education—is to fit it in when and where they can." In a recent study, Creanor et al. (2006) explored how learner control is exerted within learning environments. They found learners controlling specific aspects of their e-learning experience, such as where they studied, which technologies they used, how they personalized their learning environments, and how they approached learning activities. This behaviour was reported as being mostly invisible to tutors. Students are leading a move from a teaching-centred to a learning-centred approach.

## CONCLUSION

What lessons have we both learned about promoting more flexible approaches in higher education? Two things need to happen. First, we must be mindful of the value and role of research in innovative practice. Innovations that aim to break the traditional transmission model moulds must be rooted in a solid understanding of past research; they must be evaluated rigorously and systematically, and the results disseminated. Second, teamwork is all. It gives us a fighting chance to anticipate and

creatively overcome the obstacles to progress. The kind of discussion that Evans and Nation wanted in 1996 is still needed today: "dialogue between researchers, policy makers and practitioners and across the various sectors, traditional disciplines and national contexts of education" (Evans and Nation 1996, 176).

The third lesson is that our progress toward consistently flexible higher education is slow and challenging. Like many other writers in higher and distance education, Garrison and Kanuka (2004, 102) argue that higher-education institutions are "notorious resisters to change." It can feel that way to us, but on good days we prefer Evans and Nation's (1996, 176) comment that reluctance to change reflects "the tensions that exist between education's purposes to preserve and sustain important traditions as well as to prepare people to construct their futures." We must all weave through those tensions, avoiding as many potholes as we can on the journey.

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## ABOUT THE AUTHORS

More than thirty years ago, taking a distance-education course opened Mary Simpson's eyes to an exciting new range of possibilities. Qualifying in several fields through distance study gave her a real feel for students' experiences—good and bad. Completing her studies opened up opportunities that allowed her to develop and teach in distance-delivered teacher-education programs. It has given her much joy that these programs have provided wonderful career opportunities to people who had been denied that chance because they were unable to move to a location that offered campus-based education. Distance education's ability to provide equity of access is what really appeals to Mary. New technologies have made the experience even richer for all. She is Associate Professor and Associate Dean (Teacher Education) in the University of Otago College of Education—Te Kura Akau Taitoka in New Zealand. www.otago.ac.nz/education/staff/profiles/mary_simpson.html

Early in his career as a teacher, Bill Anderson realized that he didn't know enough "stuff" and the only way he could learn more was by engaging in distance education. From that point on, he recognized the value of a flexible and open education system as a means to extend the opportunities available for all people to involve themselves in lifelong learning. That

has driven his ongoing involvement in distance education and a career-long emphasis on enabling the social nature of education to be part of the distance-learning experience. He still enjoys meeting students he "knows" but has never met, and reflecting with them on the opportunities they have had thanks to distance education. Bill is currently Director of Distance Learning at the University of Otago in New Zealand. www.otago.ac.nz/distancelearning /otago015445.html

# THREE

## › SURVIVING THE SWAMPS OF EVERYDAY PRACTICE

# Introduction

For these seven chapters, we asked very experienced practitioners to write narratively and reflectively, to tell us as much of their unvarnished experience and lessons learned as they dared without getting into trouble in their home institution!

Their results create, in effect, a primer for change agents attempting to create greater flexibility in higher education. Consider Darcy Hardy's strategic persistence in following her principle of full collaboration with all stakeholders across a huge multi-campus system. Andrew Higgins and Mark Northover were ordered to implement, without visible failures, a top-down, imposed technology solution designed for greater flexibility. They had to rigorously prioritize tasks in order to ensure full compliance of existing systems with the new software and, just as difficult, to promote adoption of the software by faculty members. Further lessons for change agents lie in Andy Lane's efforts to inform senior management exactly how much sustained flexibility to learning and teaching might be added with open educational resources. Accompany Kay MacKeogh and Seamus Fox on what proved to be their own rocky road toward more flexible access and success routes for students after the government of Ireland withdrew its funding of their university's distance-education centre. Their "rocks" were buried in an all-too-familiar problem: the gap between the institutional "rhetoric of flexibility and accessibility" and the "deep-seated attachment" to very traditional live transmission of pre-digested content to students sitting in lecture theatres. Darien Rossiter searches for answers to her university's current lack of sustained "user engagement with flexible learning" despite a record of many innovations implemented mostly by early adopters. She finds the answers in four major constraints that, in combination, make a covertly powerful mix of forces against enhanced flexibility.

Yoni Ryan's astute and pithy observations are far ranging. They illuminate significant changes in societal values that underlie changes in education, expose the impacts of "false prophets" of technology adoption,

and explore some of the consequences of today's increasingly part-time academic workforce. She remains fully committed to the earlier drivers of flexible educational provision—those based (much more so than those today) on principles of equity, access, and robust support for all kinds of learners. Yoni sees no good reason to switch her allegiance to the current and dominating driver of online learning per se. Will her patience last while the technocrats rule? Might she see any signs of a public return to the earlier drivers of flexibility?

Do not be fooled by Non Scantlebury and Gill Needham's skilful narration of their adventures in the politics of power. They expose covert and non-benign influences on their attempts to walk their talk about enhancing flexibilities in library services and being strong advocates for students. Their analysis of their opponents' behaviour makes for very vivid imagery. But consider what forces lie beneath the surfaces of staff meetings and power plays. Discover how Non and Gill were able to stay focused on what really mattered in the long term, despite trying to manage intra-institutional rivalries.

Such brief notes on these chapters fail to do the authors justice. So read on!

# 8 › Before the Fall
## *Breaking Rules and Changing Minds*

DARCY W. HARDY

*"Hi, Dr. Hardy? This is John Doe from ABC University and I just read a story about the UT TeleCampus. We think it's a great idea and we want to build one, and I wondered if you have a moment to tell us how."*

*Ummm, okay.*

This is the beginning of my story and the basis for this chapter. You see, the idea of someone contacting me to ask how to build a multi-campus collaborative distance-learning organization in "a moment" is typical. Most people, administrators included, have no idea what it takes to develop and nurture a unit such as the UT TeleCampus. Those who do understand have probably built one themselves. The TeleCampus is part of the University of Texas System (www.utsystem.edu), which includes nine academic universities and six health institutions, with a total of approximately 195,000 students. In our case, the concept of "system" refers to a grouping of institutions where an umbrella administrative unit has broad oversight of the system as a whole. While each campus has its own administrative infrastructure, the administration unit coordinates many system-wide functions, such as group health insurance, legal affairs, and facilities and construction planning. The UT TeleCampus is a centralized utility that was created in 1998 to help further the development of distance—and specifically online—education for the UT System as a whole. But this chapter is not about how the UT System is organized or even how the UT TeleCampus functions as an aggregator. It's about the many challenges faced when flexibility is established for a system through a centralized virtual university project.

While this is not a case study on the building of the UT TeleCampus, most of what will be covered is a result of that effort to move multiple

campuses into a flexible-learning environment. I will tell you some stories about how administrators' perceptions can be more influential than reality on a flexible-learning project, how massaging egos can bring about buy-in for a new movement, and how alarming it can be to find out how little many people care about the nuts and bolts of collaboration. I also try to relate how gratifying it is when "Aha!" moments become a daily circumstance, when everyone starts to "get it," and I suggest ways to sustain the momentum and keep the idea of flexibility moving forward. And, finally, I discuss the part that economics and politics play in building these types of flexible-learning (i.e., online) systems and how they can influence the role of these systems once established. Think of it as a walk down memory lane during a time in the 1990s when online education was new, funding was flush, and everyone was excited about how this new delivery mode could increase the flexibility of the institutions—even if they didn't realize it themselves at the time. And then fast forward to 2009, when online education has indeed forced more flexibility but funding is now an issue across the board. As we often say in our office, "Everyone loves what we do but no one wants to pay for it." Intrigued? Read on—I'm just getting started.

## IN THE BEGINNING

Twelve years ago, I didn't think that creating a multi-campus "virtual university" had anything to do with promoting flexibility in our institutions. To me, this concept of flexibility was (and continues to be) all about access. But not access in a way that just means making something available—it's more about a deliberate attempt to think about students' circumstances, about how, when, and why they learn. It's about truly taking educational opportunities to a level that implies that the institution is willing to do whatever it takes to make these opportunities available to students. I also had no idea how challenging it would be to work with so many institutions at once—and I was completely naïve about various university processes. I felt from the start that because this was a good thing to do, everything would just fall into place and all of our campuses would sing my praises for heading up the initiative. This was the first of many errors in my thinking.

Faculty, for one, responded quite differently than I expected. Those of us who were developing the UT TeleCampus (the vice chancellor, various staff, and me) thought that the faculty would embrace the opportunity to develop and teach courses online. What could be wrong with being able to extend the reach of your courses, provide a more flexible learning environment, and even provide flexibility for yourself? Apparently, a lot. I remember my boss at the time, Vice Chancellor Mario Gonzalez, catching considerable criticism from faculty members across the UT System as he tried to explain the concept of the virtual university. They were certain that the system's administration offices were simply trying to cut costs by putting thousands of students in each online course and at the same time getting rid of the faculty and their salaries, or significantly reducing their numbers. We were shocked! There was very little trust in the whole idea of a UT TeleCampus, partly because of fear of the unknown and partly because we in TeleCampus were from UT System administration offices and were perceived as carrying agendas of unfunded mandates for others in the UT System. You know the old saying, "We're from System, and we're here to help." I'm not sure our colleagues believed that at first.

So what did we do? The first thing was to get a handle on, or fully analyze, our place in the process. By that I mean we recognized, accepted, and actually embraced the idea that we were going to be a service entity, and we decided from the beginning that we would provide the best services possible. That mantra continues to be a driving force in the UT TeleCampus and in my opinion—which counts, since I'm the author of this chapter—it is one of the primary reasons for our success and possibly the reason why others who did not embrace this concept failed. We help our institutions to look good. That is our goal. I tell presidents and provosts, deans, and faculty members the same thing. The TeleCampus is designed to make the faculty look good by helping them to develop and deliver high-quality courses, and to make the institution look good by ensuring that the courses and programs are meeting the expectations of our state's higher-education governing board as well as regional and discipline-specific accreditation associations. If you think about it, my assurance to a chief academic officer that what his or her institution offers online through a centralized unit is of high quality and meets accreditation standards can be a pretty powerful promise.

But acceptance did not come overnight. There were meetings with faculty senates and the system-wide faculty council, discussions among executive officers on the campuses, and conversations with distance-education staff on the various campuses. There were turf issues where one campus was overly concerned that another campus would steal its students if the other campus offered courses online that the first campus did not, or that if they both offered the course or program online, one campus might draw in potential students from another campus. There was fear of losing jobs. Many reasons could be cited for the resistance we encountered in those early years, but I think the biggest reason was fear of the unknown and the perception that this new form of delivering instruction was growing exponentially right before their traditional eyes. Scary stuff indeed.

For me, the key was to find the most skeptical but influential people on each campus and build relationships with them. It's really all about relationships. Once established, they open the door for honest and respectful discussions. They build trust. Truth be told, some of these skeptical and influential people found me instead of me finding them because they wanted to get to the bottom of what we were trying to do—they didn't want to wait for a meeting; they wanted to know right then. Sometimes the conversations were tense and challenging, but in the long run, I not only won over most of those skeptics, I went on to have great friendships with them. I can look back at those beginnings and say with all sincerity that building those relationships has had a major influence on the success of the TeleCampus.

One of my favourite books is *The Power of Nice—How to Conquer the Business World with Kindness,* by Linda Thaler and Robin Koval. I happened to catch Thaler and Koval talking about the book on the *Nightline* television program several years ago. They caught my attention because everything they were saying was exactly how I attempt to live my life, both personally and professionally. Although the title of the book references the business world, the "Power of Nice Principles" (there are six) can be applied to education, any workplace, or life in general quite easily. With chapters entitled "Tell the Truth" and "Shut Up and Listen," you learn quickly that by being honest with colleagues, by acknowledging their own level of understanding and expertise in addition to your own, and by

actually listening to their ideas instead of formulating what you plan to say next while they are still talking, you massage their egos in a way that is sincere. I don't use the idea of massaging egos in a negative way. What I have learned, however, is that everyone needs positive strokes. When you are attempting to do something revolutionary (which is how I view what we did in building the TeleCampus in the late 1990s) and you don't provide those strokes, or you don't appreciate the thoughts expressed by those you plan to serve, you'll end up going nowhere before you ever get started. I highly recommend the book (it's a short read) for anyone planning to jump into a lion's den.

Another major driver to our initial success was our relationship with the UT System Board of Regents, particularly Regent Tony Sanchez. We met regularly with the board back then, so the members understood well what we were doing, and having a regent who was excited about distance and online education at such an early stage was truly an advantage. Combine that with having an innovative chancellor like William Cunningham and things happen. We could have had all the great ideas in the world about how to move the initiative forward and become change agents, but without having access to people with power, we wouldn't have been successful.

The bottom line is that the establishment of strong relationships helped to break through the barrier of mistrust we were bound to experience, and they helped to change the minds of many a skeptic. And when some of those relationships are with influential administrators, they can open doors across an entire campus—or a system, for that matter.

## "COLLABORATE? ARE YOU KIDDING?"

One of the reasons behind the establishment of the UT TeleCampus was to facilitate collaboration among our campuses. Our first program, in 1999, was highly collaborative—an MBA that involved eight schools of business at eight institutions. I know what you're thinking. Yes, looking back, we probably were crazy, but at the time, it seemed like the right thing to do. And in the long run, it worked well to get a lot of people on board quickly and to jump-start the online initiative.

The challenges were many. We needed the schools to agree upon a curriculum, agree upon who would develop and deliver what courses, agree to accept each other's courses as their own, and agree to offer the degree even though the student would take only two courses from the home institution. And if that wasn't enough, we had to figure out how to allow these students to take courses from multiple institutions without being admitted in a traditional manner so they could avoid applying for admission to each campus separately, paying application fees, and so on. Oh, and let's just throw in the fact that the UT System institutions do not share a common student information system, nor do they all use the same brand (e.g., PeopleSoft, Banner, etc.). Moving them to a flexible-learning environment all at once was not going to be easy, but once we decided to develop the program, there was no turning back.

Like most university systems, the institutions in our system were not used to collaborating on many things in 1997. All of our campuses are standalone institutions, with UT Austin being our flagship research campus. The remaining eight academic campuses are not satellite versions of UT Austin; they each have their own mission and direction. And most of them are located several hours from each other, so the idea of working on projects, much less academic programs, in a collaborative fashion was foreign to most faculty. But we were determined to bring this new model forward and help our campuses to work together.

It should be noted that UT Austin was not one of the eight campuses involved in the collaborative MBA. Remember that online education was brand new and did not have the reputation for quality that it has today. The dean of the business school at that time probably had legitimate concerns about how it would look for his business school to be involved in a collaborative program like this. He was paid to worry about the business school, not to worry about a UT System initiative. I don't think it's a secret that flagship institutions will generally push back on collaboration if they do not consider the potential collaborators to be peer institutions.

So how did we get the eight participating schools of business to agree to this whole collaboration thing in the first place? Easy: it was cash. Chancellor Cunningham, who, as I've mentioned, was very innovative and believed in having the campuses work together, had the foresight to recognize that in order to get the campuses excited about an initiative

from the UT System offices, he needed to provide financial support to help offset course-development costs. After all, even though we were facilitating the collaboration and wrapping a suite of faculty (training, course development) and student (digital library, access to key staff on campuses) support services around the program, the courses and the faculty members belonged to the institutions. And while it of course helped that the push for the MBA was coming from a chancellor who also happened to be a former dean of the UT Austin school of business as well as a former president of that institution (and some of the deans probably went along with the idea for those reasons), in the long run, I think the deans would all agree that it was indeed the right thing to do at the time and that by working together, we built an extremely successful program.

I think one of the biggest mistakes that people in senior leadership roles like mine make is to not bring the right people to the table at the right time. It's almost as if we want to avoid the pain and misery so much that we skip certain steps in the process. For example, once we decided to build collaborative programs, it became clear that we couldn't expect students to formally apply for admission to every campus involved in a program and then ask them to register separately at each campus each semester. At the same time, we knew that making changes to any administrative process was going to cause great distress for our admissions officers and registrars. But pushing forward the concept of flexible learning is not just about developing programs or changing viewpoints; it involves serious consideration of how our administrative processes must change to accommodate new ways to deliver higher education.

We chose to bring admissions officers and registrars to the table early, and, as you might imagine, we definitely "rattled their cages" and provoked some mental anxieties: "What? Allow students to take courses from the institution without filling out the traditional forms and then not register in the typical manner?" But do you know what happened? After all of the discussions about why this wouldn't work or how it couldn't be done, it was the people at the table themselves—yes, the very people who pushed back at the beginning—who came up with the solution. This is how you make changes that stick. You don't mandate and you don't try to create the solution yourself. Instead, you let the people who understand the issues make the changes. My role as the leader of this new organization was to

provide a space where solutions could be discovered and to encourage the process with positive reinforcement. As a result, we ended up with a process that would allow students, once admitted to a UT institution, to enroll in courses across the system, and the process was developed by the very people who would be administering it. It was a win-win for everyone, and it put us one step further down the road to creating that flexible-learning environment.

So, as you can see, what happened during the process of creating the MBA as a highly collaborative program is that we accidentally stumbled into transforming policies and processes that forced what we are now calling flexible learning. We had no idea at the time that we were actually providing the stimulus for systemic change on our campuses. I am not implying that our campuses had not already been delivering distance education—many had been doing so for years—or even that we were the first organization in the UT System to put forward ideas about online education. But by stepping way out of the comfort zone of so many people to build highly collaborative programs, we were able to break through barriers and change points of view in a broad way. And, as a result of the experience developing the MBA, the TeleCampus became known as a "collaboration engine," which opened doors for other projects that would come in our future.

## STAKEHOLDERS AND THEIR INFLUENCE

I wish I could say that all of our stakeholders have understood the TeleCampus and what we do and that they have been our champions. Unfortunately, and realistically, I can't do that—but please know that we had a lot of stakeholders, from our boards of regents to UT System executive officers, to campus presidents and provosts, to the deans and faculty members on those campuses. We are a very large system so it's not necessary for everyone to be in favour of what we do. However, it does make a difference when the stakeholders decide to take a stand one way or the other. I'll never forget the year we were just starting to develop the TeleCampus. In a meeting, Regent Sanchez asked me, "Dr. [he always just called me Dr.], why can't we just film every professor at UT Austin and

send it over the Internet to our campuses?" This was 1997, mind you, so my first response was of course related to the technology and how we hadn't reached the point of sending full motion video across the ether. But the second part of my response really got to the heart of the matter. In order to build buy-in for a multi-campus initiative, it's important that no one campus (especially the flagship campus) be seen as superior. Whether or not the campus is ranked higher than the other campuses in the system is irrelevant for a project like this. We needed all of our campuses to feel that the TeleCampus was a service entity for them, individually and collectively. Fortunately, Regent Sanchez understood exactly what I was talking about on both fronts, and the suggestion was never made again.

There are other stakeholders who have had a huge influence on what we do but who still don't quite understand us, or understand why online education has become so popular. It's a little disheartening when I give a presentation about all the students we reach and how high our course completion rates are and I get a comment about the value of running tracks and trees on a college campus and a question about how we can possibly replicate those online. That's when I wish I could scream, "The students we serve don't care about the track or the trees on a campus!" But of course I do not, or at least I don't scream it. I mean, I'm passionate but I'm not crazy. And is it flexibility or convenience, and does it matter? I was once told that we don't need to make it easier for these "time shifters," referring to students who choose to supplement their face-to-face course schedule with an online course here or there because they work, or they have family needs, or they simply do not want to get up early on Tuesdays and Thursdays to sit in a four hundred-person auditorium and listen to a teaching assistant lecture. Regardless of how people look at online education, whether they like it or not, or if it bothers them because it makes access too easy, the online train is rolling full blast and it's not going back to the station now.

Generally speaking, some of our most influential stakeholders see us as only a technology shop. It's not their fault since most of them have not been on the development and delivery side of an online course. They may think that it's simply a matter of a professor making class notes into a pdf and/or posting PowerPoint slides (and even adding audio!!), requiring a reading assignment or maybe a post or two in the discussion

forum, and then providing some type of assessment. Some may stop at the posting of the slides. At any rate, we all know that developing a quality online course takes much more effort than that. Without experiencing it themselves, it's probably unfair to expect them to really understand. So our endless job is to help them see that technology is only one part of what we do. UT TeleCampus and its staff are about teaching and learning, technology, marketing, and student services, and about making our suite of services available for our fifteen institutions and the students we serve together.

I have worked hard to build positive relationships with our various stakeholders over the years. Chancellors have come and gone, regents have come and gone, campus presidents, deans, and faculty members have come and gone. But the students keep coming, and they are coming in larger and larger numbers. By far the majority of our stakeholders do understand what we do and understand the need to meet this growing population. Furthermore, they embrace this innovative way to reach new students. We continue to have innovative members on our Board of Regents, as well as chancellors and presidents. I have found that those who are the most innovative seek to know more about the online world, and whenever possible, I try to deliver. As a result, I now have a strong set of mentors who help to guide me in challenging situations. As I said previously—it's really all about relationships.

To date, my success rate in educating and convincing stakeholders that what we do is a benefit to our university system is about 70/30. Some can see the systemic changes that have taken place across the campuses to benefit a flexible-learning environment, and they think it is good. Others don't think it's important, and still others don't notice at all. Some don't understand what we do simply because we don't see or meet with them face to face. Face time with stakeholders is critical, and when you don't have it—for whatever reason—life can become quite interesting. But does the 70/30 split worry or depress me? No, not most of the time because I am sustained by the lessons I've learned over the past twelve years, and I am confident that what we are doing is good for students who want access to high-quality online courses and degree programs. Where better to get those programs than from the University of Texas System?

## LESSONS LEARNED

As you might expect, and as a result of my twenty years in distance education, I have learned many lessons. Some were easy, others more difficult. Some of them shouldn't have had to be learned in the first place, but I think they helped me to understand how to bring flexible online learning into the mainstream across my institutions. I share a few of them with you in no particular order of importance.

1. It is important that a change agent have access to people who have the power to help make the change agent successful. If you are going to do something revolutionary, you have to find champions in high places. Once you find them, hang on to them as long as you can and build your program as well as you can, because the day will undoubtedly come when you have some in power who are definitely not your champions. Having established a solid organization might just carry you through any hard times you may end up facing.
2. You have to prove yourself as someone who can provide assistance and add value—and you must show that you really do know what you are doing. As I mentioned, I work at the administrative level of a large university system. When we started designing the UT TeleCampus, it wasn't as though the campuses were just sitting there waiting for us with open arms. In a situation like this, or one where you are trying to convince a skeptical audience that flexible learning is the way to go and that your group in particular is the one to go with, proving your value and having a *healthy* level of confidence may be the best way to gain the trust you need to be successful.
3. Don't worry about who gets credit. If the bottom line is that you need something to work, find a way to get there. Work with the people who can make it happen. If necessary, guide them through the problem you are facing and, even when you think you already know how to solve it, allow them to reach the same conclusion on their own. So what if they think it's their idea? You end up getting what you need and they feel a sense of partnership—which is exactly what you want.
4. Understand that you are not a faculty member and therefore will never have the clout to speak to faculty as a peer. Find champions

in that audience and help them to reach out to others. Sometimes faculty are hesitant about putting courses online because they don't want to make a mistake and look bad in front of the students or their colleagues. Your champions can go a long way in making hesitant faculty more comfortable in the online learning environment.

5. I don't think I can say enough about the importance of keeping your cool and remembering the principles of being nice. It almost sounds too easy, but in the ever-changing world of online education, just reaching out and being collegial—as opposed to mandating and/or demanding change—can move an initiative forward much faster. Honest and respectful communication is critical. When I was younger, I didn't know how to bite my tongue very well. When I felt that someone was treating me, my staff, or my organization unfairly, I would defend in a way that made me feel good at the time but that got me nowhere—and certainly didn't change the opinion of the offender. Today, I defend in a way that is much more strategic and much more focused on getting the most positive outcome possible. Rule #1: Write the first email while you are upset to get it out of your system, read it, delete it, wait twelve hours and then write the one you should send. Rule #2: Never pick up the phone when you are upset. See Rule #1.
6. Know which rules to break and ask for forgiveness later, which ones to bend, and which ones to leave alone. The editors of this book asked me to give some examples here. I am of course hesitant because I am still breaking and bending rules (in a good way), but here's one. As mentioned previously, our first program was the collaborative MBA. We announced that we would be developing it, we received a proposal from the eight schools of business that outlined how it would be designed, and we even started course development *before* we realized we had a serious problem. Since the students would be taking only two courses from each campus including the home campus, we were going to be in direct violation of an accreditation rule regarding a residency requirement. We didn't want to stop the development, so we contacted the accrediting agency, worked with them, and ended up becoming an example of how to do collaborative programs. The newest principles for

accreditation from the agency include a statement that allows for collaborative programs—by breaking a rule, we were able to pave the way for others.

## CONCLUSION

If you have dark and stressful moments about working on flexible online learning within *one* institution, add fourteen to it and welcome yourself to my world. Overall, I would have to say that I love my job, I love the people I work with—okay, most of them—and I love the fact that I've been a part of this learning revolution. Have there been moments when I thought I should have gone into a different field? Honestly, no. Even with all of the frustrations and challenges that come with doing something new and different, even when people don't really understand what we do, even when I'm wrong, I can't think of anything more exciting than being able to provide vision and ideas about the way to design things like the UT TeleCampus. Anyone who knows me well knows that I'm at my best during the building phase of things and am not one to enjoy the maintenance phase. I'm not always strategic in my planning, but I know enough to surround myself with people who are. I suppose that is another lesson.

The TeleCampus is about to embark on a new project that excites me greatly. There is a growing population of adults who have some college credit but who have not received a credential—a diploma or degree. For the most part, these adults are not interested in driving to a campus to sit in a classroom with fifty to a hundred eighteen- and nineteen-year-olds three days a week. They are not interested in taking time off of work to go to class. And they are definitely not interested in packing up the family and moving to a college town. What they *are* interested in is a convenient and flexible way to earn a legitimate college degree. Working with some very innovative institutions in the UT System, the TeleCampus will roll out a number of accelerated online bachelor's degree completion programs in the fall of 2010. This is what it's all about: providing a flexible learning environment to meet the needs of a target population. Just thinking about how many adults we are going to help in the very near future reminds me that no matter what anyone thinks, what I do is worth it.

"Texas Kills Its TeleCampus"—such was the *Inside Higher Ed* online publication headline on 9 April 2010. The day before, I had met with the University of Texas System chancellor and he had informed me that the UT TeleCampus (UTTC) had accomplished its mission and would be closed on 31 August 2010.

When I was asked to write this postscript to explain what happened after I had written the chapter, I wasn't sure where I would start or end. I believe that many colleagues who either wrote about the closure or who wrote to me personally have a pretty good understanding of what happened. But the bottom line is that the decision was made to decentralize online education services for a move that "will allow greater access to UT courses online, leading to improved student success and graduation rates" (from the UT System press release, 8 April 2010). Operationally, each campus in the UT System is now responsible for all things related to distance and online learning on that campus. There are no longer any centralized services like a common course-management system (CMS), marketing services, or a 24/7 help desk, or even a consistent quality-control system, although there are still some common activities among those campuses involved in collaborative degree programs.

It is true that most of the UT campuses are prepared, to some extent, to handle online education. They each already have a CMS and several have robust support centres with strong and experienced leadership. To the inexperienced administrator, it might have looked as though the TeleCampus was a duplication of effort. In truth, however, eliminating the TeleCampus operation means that the UT System campuses now have to duplicate all of the services that were centrally offered through the UT TeleCampus—or not offer them at all. And if they do offer the services, they are now duplicating effort. As for whether this decision will increase or decrease flexibility in the operations and user interfaces of the UT System, that remains to be seen. Clearly, those making the decision to decentralize felt that by doing so the campuses would experience greater flexibility via a smaller, less-coordinated operation. As many colleagues have pointed out, only time will tell if the decision was indeed the right one.

Today, the UT TeleCampus is closed. The entire staff has moved on to other things. For me, the bright side is that staff members of the TeleCampus—from its beginning in 1997 to its end in 2010—are able to take the good work we did and the incredible things we learned, developed, and accomplished, and spread that knowledge and expertise out across the state, our country, and indeed, the entire online education world. When we recall all the accolades we received during those thirteen years, it feels pretty powerful: we can say that there are approximately fifty-plus people now doing great things based on what we did at the TeleCampus. Even if those fifty-plus colleagues are not in the field right now, I know that they are using things they learned from our teamwork at UT TeleCampus.

Personally, I learned more in the past three years about professional relationships and trust than in all the other years of my career combined. Call it my "coming of age," if you will. My innocent belief that good things happen when you work hard and show success has been shattered. I have become a more "hardened" individual. And, regrettably, I'm less emotionally charged than I once was. It was a rough time for me personally and I still carry some guilt over what happened. What could I have done differently to prevent this? And it doesn't matter when people tell me that the decision was not my fault—if you are a good leader, you take responsibility for what happens to your staff. That's what I believe, anyway.

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## ABOUT THE AUTHOR

Darcy W. Hardy earned her bachelor's degree in industrial arts, planning to follow in her father's general contracting footsteps. As her senior year drew to a close, she decided to get her master's degree in education—with an industrial technology major and a counseling and guidance minor. Truth was, she really just wanted to keep going to school. The next step was a doctorate. She dropped the *industrial* focus and switched to an *instructional* focus. After her PhD, Darcy landed her first distance-learning position in 1989. For twenty-one years she has thoroughly enjoyed changing minds about distance learning and, of course, making other people eat their words as she and her staff overcame significant operational and political challenges to deliver innovation for greater flexibility in higher education. Darcy is Assistant Vice Provost for Education Technology Initiatives at the University of Texas at San Antonio. In January 2011, she began a one-year appointment with the Obama Administration through the Department of Labor, working on various department initiatives with a focus on the use of online education. www.utsa.edu/oit/about_oit/OIT_DHardy.html.

# 9 › Implementing an Online System *Voices of Experience*

ANDREW HIGGINS AND MARK NORTHOVER

*This chapter is a two-voice narrative about our experiences concerning the introduction, implementation, and operationalization of Blackboard (AUTonline) at Auckland University of Technology (AUT).*

In 2002, Auckland University of Technology (www.aut.ac.nz) appointed me (Andrew) as director of flexible learning to join the senior management team on a two-year contract. The university had recently acquired a learning-management system, Blackboard. The then–deputy vice chancellor said, "We've just bought Blackboard. It's your job to make it work."

We suggest that a technological development of this kind may be divided into the stages of initiation, deployment, engagement, and maintenance. Within the stages of initiation and maintenance are the elements of stability and security. Within the stage of engagement is legitimation. In this chapter, we will look first at initiation and then at deployment and engagement. As the new director, I (Andrew) wrote a university policy about flexible learning, much of which became absorbed into the institution's learning and teaching framework. This work legitimated the use of a learning-management system as a tool to be used for teaching.

As change managers know, the strategic success of any substantial innovation will be determined by the politics of the process rather than by the inherent value of the innovation itself.

## INITIATION

As devotees of Everett Rogers' work on the diffusion of innovations (2003), we understood that we would face some large challenges. Our institution

had recently become a university whose main modus operandi had been small classes taught on campus, with a very small distance offering. AUT comprised four faculties operating somewhat independently with a limited central set of support services for staff and students. The staff development unit (SDU), where I (Mark) now reside, had recently subsumed the institutional multi-media unit and was deemed a logical central service from which to support flexible learning. A visit to the faculties revealed two learning-management systems in operation: one had been written by a close relative of a senior staff member and the other, a commercial system, was based on software not widely used at the university. Neither one had substantial uptake. Part of the system standardization also initially worked against those innovators who preferred to forge their own path. There is a fine balance between the contribution these innovators make to the evolution of technology application (always valued and never doubted) and the need to standardize systems and processes for large-scale support.

The SDU proposed a two-year trial of the newly acquired Blackboard product with three staff and some thirty students. The Deputy Vice Chancellor (Academic) proposed that I (Andrew) chair the university's Learning Technology Advisory Committee (the nearest it had to a learning and teaching committee) and drive the flexible-learning agenda through it at a much faster rate than initially proposed. This move signalled a clear mandate to move in the flexible-learning direction, although there appeared to be little by way of knowledge, skill, or experience among the staff. It quickly became obvious that Blackboard could not be allowed to fail and that its first point of failure would be the easiest to address, that of technical hardware stability and software reliability.

The first part of the no-failure policy involved having a detailed plan, with costs calculated over three years, developed and presented to the senior management team so they could be fully informed of the human, physical, and financial costs involved. This project also needed the particular support of the chief financial officer, who, when she asked what the cost savings to AUT were, was given the honest reply of "nil." However, the loss of reputation for being a technology university unable to use technology in teaching might be considerable over time if we did not adopt digital approaches to learning and teaching. A technical-service analysis

revealed that the university's server room had no independent backup power supply, was prone to overheating, was located in a basement that could flood in the event of fire elsewhere in the building, and had no physical firewall. Additionally, the university had only one fibre optic inward cable, which could be easily destroyed by a construction machine in the event of rebuilding. The project became a catalyst to address such issues by acquiring an external generator, fireproofing and air conditioning the server room, and adding another fibre optic inlet at the opposite end of the university. Nothing could be done about the server room location until another nearby university created a purpose-built room that we could share.

Ensuring that all the software and server systems complied with the Blackboard specifications took some time because we needed to convince some IT staff of the need to do this. One or two trial startups soon convinced them of the need for compliance. The learning-management system required a single source of data about who was a student and who a staff member. The student-management system could not easily supply such information because the four faculties, still operating partially independently, supplied data in different formats. My (Andrew's) meeting with faculty registrars convinced them of the benefits of consistent data sufficient to allow the automation of enrolling students into the learning-management system, although it took another two years to fully integrate the process.

After about eight months of planning and preparation, the project was sufficiently robust to begin its implementation. At this point, it became possible to close the existing incompatible learning-management systems. The most difficult and lengthy part of the Blackboard implementation process could now begin because the technology environment had sufficient backup and stability. This work concluded the initiation phase that set the direction for the next several years of development.

Meanwhile, those opposed to this significant change in how AUT undertook learning and teaching had managed to remove some key staff on whom I (Andrew) relied and had sought to deploy their own favourites in important positions. A quick decision to manage via a "flat" structure disarmed the opponents. Nevertheless, an important committee overseeing the implementation process became stacked with central office

personnel opposed to the new developments. Practicing faculty reduced their attendance as a consequence. The committee held up some new activities by seeking to conduct excessive consultations with indirectly related groups. The assistant vice chancellor dissolved the committee as a result. AUT appeared to have a subterranean set of networks; I knew that it would take me too long to find out where these were and who manipulated them, and I decided instead to do the preparatory work, as detailed below, and then wait and see where the opposition came from. Once that became clear, I could explore what and who lay behind the opposition. A close friend told me early in the task to look out for politics very close to "home." A smiling face, apparent agreement with the process, an offer to help with some unrelated matters hid a deadly disagreement, often exhibited by a waver of the voice, a change in the tone of voice, and, expectedly, rumours relating to my competence and a lack of "fit" with the current ethos. Nothing could be clearly identified, but it was all enough to be unsettling.

## DEPLOYMENT

Transforming teaching toward a more flexible or blended approach required major shifts in academic practice and belief, which proved to be the largest hurdle to overcome in introducing flexible learning to AUT. Rogers' (1995) description of the psychological characteristics of innovators, early adopters, and leaders of the early majority proved to be very valuable. The university made sufficient funds available to appoint flexible-learning advisors (FLAS) to work with staff. At the same time a small specialist team was established to support the IT help desk personnel with Blackboard-related matters. The position descriptions for the FLAS included skill and experience as a tertiary-level teacher, preferably with some e-learning or distance-education background. There seemed to be little point in simply making standard face-to-face teaching electronic, which was a possibility arising through the use of staff developers skilled only in lecturing to small groups. The university established several computer laboratories around its campuses for those students who did not have computers. Flexibility in terms of time, place, and pace of teaching

became key concepts in seeking to transform teaching. It would be fair to say that some staff supporting older ways of teaching needed to rethink their approach or be prepared to find work elsewhere in the university or outside of it.

These actions and expectations around new teaching models alienated some staff, particularly those who saw themselves as guardians of the old ways. At about this time, the university renamed Blackboard as AUT*online* to give the product a more local flavour. The FLAs were pointed toward the early majority leaders in faculties because they had frequent contact with peers, held positions of leadership, and tended to deliberate carefully before adopting an innovation.

The actual employment of the FLAs heralded the start of the most significant phases of transforming learning and teaching, those of deployment and engagement. They developed and operationalized grant-supported work to provide resources to enhance learning and teaching, all of which became an important mechanism for funding teaching transformation. Although small in size, the grants gave successful applicants access to multi-media developers as well as cash to buy out teaching time to redevelop papers (subjects) and specific courses.

Within just a few months, it became clear that staff and students demonstrated substantial support for what we now termed blended learning, that is, a blend of the new digital technologies with older teaching strategies. The learning-management system catalyzed all the changes and so paved the way for the employment of more FLAs, a larger AUT*online* support team, and a Flexible Learning Services manager (Mark) to oversee the operational elements of the work. Operational management moved from me (Andrew) to Mark as I took on a permanent and wider role in the strategic advancement of digital technologies beyond the learning-management system.

Separating operation and strategic roles is not a new phenomenon and can have substantial advantages. In this case, those advantages were realized, largely because the vice chancellor and the deputy vice chancellor made it clear that the university would be moving forward in the flexible-learning mode in the near future.

The main lessons that I (Andrew) learned concerned the need for the university to allocate clearly defined roles and responsibilities to staff,

with enough *mana* (a Polynesian term for standing, respect, or personal qualities that serve to inspire or lead others) in the system to ensure that decisions were acted on, and the need for the university to hold fast to its vision and avoid distractions on the periphery that could have dissipated its resources. A sound theory (Rogers) and a competent operational arm ensured our success.

## ENGAGEMENT

In late 2003, I (Mark) started working as the Flexible Learning Services (FLS) manager at AUT, where we now have over 25,000 active users of our learning-management system (probably 90% of the entire student body). I consider the major success to have occurred not with those who were keen to use the Internet ten years ago, but with the other 90 percent of teaching staff—those who were reluctant to even start using email at that time. The early adopters would find a way to make it work regardless of its relevance, but the late majority needed to be convinced that there were sufficient benefits in the effort. It took AUT over five years to make that shift.

A key aspect of scalability has been the enrolment integration for students. When I started at AUT, each online-course lecturer had to fill out a paper form that was transcribed onto an Excel spreadsheet and was manually batch-run by a technician in IT Services. The "policy" at the time was "if the forms are not in two weeks before semester start, the students won't be enrolled." It was immediately obvious that this was not a workable solution in the long run. As inconsistent faculty processes gradually aligned with one another, I needed a technician who was part of the flexible-learning team, who would understand exactly what we wanted and needed in the system, and who could devote full attention to the learning-management system.

I also needed a technician I could talk to and who could talk back to me. For a while, we had technical support staff who would email in grunts. Here is one example. My message read, "I note that the AUT*online* server was down overnight. Can you bring me up to date with how long the outage was, what caused it, what did you have to do to bring it back up, and what needs to be changed to ensure we avoid a repeat?" The

answer was "It's fixed." Not altogether helpful! Once, the nightly back-up process was suspended while the technician investigated more efficient processes. He was then side-tracked onto another task and never got back to the AUT*online* back-up. It was not until two months later that I found we simply didn't have a back-up process in place! It was back later that day with profuse apologies from the IT team leader. That was a very narrow escape from a disastrous data loss. If staff and students had experienced such a loss, we would have had a much harder job building system confidence and encouraging staff to persist with online teaching. In fact, I am still convinced that system stability is of critical importance in gaining a large level of acceptance. I occasionally hear academics (faculty members) say, "I won't put all my resources online because we can't access them when the system's down," when in fact we now only have perhaps one or two unscheduled outages in a year, and they have all been very short. But the reality is not what's important here—it's people's perceptions that make the difference.

It took a year to appoint a technical systems developer to a team outside IT Services, but this was surely one of the most important elements of what makes the flexible-learning team a success. Initially, the IT systems and interfaces were a black hole to me, but having our own technician now makes questions easier to ask and answers easier to understand. The technician works in the same open-plan office as the system-support team and knows exactly what the issues for teachers and students are—he deals with them every day. We now have access to on-demand reporting and building-block development as projects require. I'd love at least one more developer to be his support, but it's working well at present.

We now provide a Web interface for lecturers to manage their own courses, other lecturers involved, and the students. This still creates issues for those staff who forget every six months how to manage the process, but we're definitely making progress. An automated process now kicks in for all courses (subjects). Even with Blackboard providing the core functionality of AUT*online*, some lecturers have sought extra online functionality. Some found their own solutions in using external Web services, mainly for blog and wiki activities. We have met those extra needs by adding more secure third-party applications internally and, in a few cases, even building our own applications. These give blog and wiki capability, podcasting

options, voice tools for seamless recording and playback, and a synchronous online classroom. Our most recent toolset is an e-portfolio system, and uptake and reliance on this are steadily growing.

In fact, growth and penetration of e-portfolios have highlighted another systemic challenge. Students see the greatest value in the portfolio if it can be used beyond graduation as a professional accreditation tool. Current IT processes prevent access once an enrolled student's credentials expire. The university is discussing ways of enabling alumni access, but some staff are slow to be convinced of the inherent value (e.g., in return business) of providing supported IT tools to alumni.

Additional tools carry the potential to overload our academic staff. Many are already struggling with the initial concepts of e-learning. As uptake grows, along with student expectations, a capability and confidence gap emerges. The concepts of Web 2.0 bring additional challenges to the technical capabilities of academics, especially for those who don't embrace these technologies at a personal level. So we try, through the use of the flexible-learning support team, to keep them from being overwhelmed; a system with poor or inaccurate support would cause more problems than it would solve. Our bi-weekly flexible-learning team meetings devote a half-hour session to presenting or airing an issue of concern, a new technical development, a pedagogical approach, and so on.

The question of student wants and needs in technology-enhanced tertiary education is a vexing one. We have evaluated perceived student value of our flexible-learning system and we also receive much useful anecdotal student feedback. Much of the growth in uptake has been driven by student expectation, as the Web becomes the de facto medium for information access and communication.

However we develop the technology, the effective academic purpose of online activities can be debated. If these activities are not constructed and supported with clear and well-communicated purpose and with processes and milestones, students will not engage. In my opinion, the key is personal engagement with the technology from the lecturers themselves—if they have never used these tools themselves, it is most unlikely that they will promote good levels of engagement from their students. This, in my view, is the current digital divide—those lecturers who embrace and understand the technology and its social impact, and those who don't. It

is a vital role of FLAs to encourage those staff for whom it is daunting to use digitally mediated learning and teaching.

## MAINTENANCE

At the Centre for Educational and Professional Development (recently renamed the Centre for Learning and Teaching), we rarely get involved in student orientations (in using the online learning system) or dealing directly with student help requests: we believe that this responsibility lies with the faculties and the IT Services help desk. But we do provide information and user materials for students. In fact, reviewing the IT help desk calls suggests that students have very few problems other than the standard technical questions related to log-in issues, computer setup, and so on.

We run a variety of options, such as scheduled workshops (often not well attended), just-in-time workshops for school or program groups (very popular at key times of the year), one-on-one consultancies (always hard to meet the demand), and phone support for staff. We also increasingly advertise drop-in sessions, during which a flexible-learning support person is on hand to deal with issues with which the lecturer needs assistance.

Phone and direct email support is undoubtedly the heaviest workload for both our academic and administrative support groups. It is also the most critical and, I believe, a key reason for the positive uptake of flexible learning. The most important need of teaching staff is to have an issue resolved or a question answered when it is relevant; some teachers might ring five or six times a day as they work through a complex issue, and at times this extent of need is very difficult and frustrating to support. I have often overheard a patient and supportive phone conversation conducted by one of my staff, followed by a private explosion of frustration in my office when the consultation is over. I am fine with this if it helps to grow the user's confidence. If teachers do not feel supported, significant numbers of them will avoid engaging with the technology that the students want them to use.

As I imagine is true in most large institutions, our university tends to exist in silos, limited by faculties and schools. In an attempt to share

experiences and cross-fertilize ideas, we run an annual show-and-tell seminar called FLEXIT (Flexible Learning Experiences in IT). Usually themed in some way, the seminar brings together presenters and audiences across all faculties. It is one of the few occasions when academics can say, "We thought we were doing well, but we never thought of doing it that way."

## LESSONS LEARNED

The most important lesson I (Mark) have learned is that of being of service. The entire flexible-learning team works on the basis that team members are there to help staff move toward a blended-learning model using digital teaching techniques. The mantra "How can I help?" is part of their daily lexicon. Another important lesson has been the value of a consolidated, centralized support team; having technical, administrative, and academic support all in one team allows for greater communication and more cohesive efforts.

## CONCLUSION

AUT is one of the biggest users of any learning-management system in New Zealand, whether commercial or open source. Its use is on a par with the more successful institutions in Australia and in other parts of the Asia Pacific region. The university achieved this result because it had a strategic vision, it created a structure to enable the vision to be enacted, and it made sufficient human, physical, and financial resources available to build and support the structure. With all that said, both of us see some new challenges ahead that will test our innovation skills and courage. Those challenges include moving academic staff into a pragmatic blended mode of teaching that they believe in and providing technological solutions based on sound pedagogy that improve student engagement and learning. Incorporating more personalized learning, more active learning, and greater student independence are potential future ways forward. We envisage substantial changes in pedagogy and assessment practices.

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## ABOUT THE AUTHORS

Andrew Higgins lived and worked in remote outback Western Australia, where he studied by travelling long distances on dirt roads at night. Later, in another life, he taught kids in Mt. Isa and studied to complete his educational qualification by correspondence in the outback mining town. He concluded that there must be a better way. His thinking about distance education led him to the view that the Platonic model is based on the co-location of students, teachers, and resources in space and time. If we could break that fundamental paradigm and show that we can both learn and teach outside the paradigm, we have gone a long way toward showing that the world's knowledge resources really are at everyone's fingertips. E-learning is a step on that path. Andrew was Director of E-Learning and Director of Flexible Learning at the Auckland University of Technology in New Zealand and is now an independent consultant.

Mark Northover set out to be a doctor of medicine, but lifestyle choices caused an early rethink. Education seemed a convenient alternative that

fitted well with his future wife's study and career. Since then, the combination of technology and good teaching that engages students has been a consuming and fascinating interest. While it's not always easy to mix this with the wonderful New Zealand outdoors, bush and mountains, there are parallels with ecologies of learning—the blend of technologies and pedagogies for effective twenty-first-century higher education requires a certain degree of adaptability and "fit for purpose." The challenges and rewards of recent educational evolution are enough to keep this old grey matter ticking over nicely. Mark is Manager of Learning Technologies and Associate Head of the Centre for Learning and Teaching at the Auckland University of Technology in New Zealand.

# 10 › Adding Flexibility to Higher Education Using OERs *Lessons from the Open University*

ANDY LANE

As director of OpenLearn (www.open.ac.uk/openlearn), I am often asked, "The site is impressive, but does it give more flexibility to what people can do in terms of teaching or learning?" I get asked that as much by people within the Open University (OU) (www.open.ac.uk) as by people outside it, especially by senior management, who expect more impact than just winning awards and acclaim. Publishing open educational resources (OERs) costs money, and while senior managers are seeking a return on investment to at least cover those costs, they still think that OERs may fundamentally change or disrupt teaching and learning practices—in particular, by disaggregating the different elements of teaching, learning, and assessment—and they want to be prepared to move the OU along with those changes (Lane 2008b, 2008c). So what is my response to the question "Do OERs add flexibility to how teachers can teach and how learners might learn?"

First, some background. The whole rationale for OERs is that they are to be used, taken away, adapted, and adopted by others (D'Antoni 2009). The flexibility provided by applying an open licence, such as those devised by Creative Commons (www.creativecommons.org), in principle gives people much more personal choice or control over access to educational resources, whether they are teachers or learners. The Massachusetts Institute of Technology (MIT), through its 2002 OpenCourseWare initiative (ocw.mit.edu), has shown a latent demand for access to an online store of quality educational resources supporting classroom-based teaching and learning from among a well-educated audience. MIT also inspired many other educational institutions to follow its example (www.ocwconsortium.org). However, while such educational resources may be open, the question remains: will they create significant change and greater flexibility in

educational practices? By *flexible*, I mean that learners around the world are able to construct their own learning paths to suit their own learning styles, teachers from all continents are able to draw upon high-quality resources and learn new strategies and tactics for teaching their chosen disciplines, and eventually universities everywhere can restructure how they offer teaching and learning services. Alternatively, might OERs just reinforce existing educational practices and divides, with the educationally and technologically privileged gaining more than those who suffer multiple deprivations and who currently have little or no access to higher education or appropriate technologies (Lane 2008a)?

This was the starting point in 2005 for the OU's own deliberations over what it should do to join this new movement. Much of the discussion was founded on reinterpreting our mission of "openness," the assumption being that OERs and the OU are a natural match (Gourley and Lane 2009), which, in particular, raised the issue of how far openness and flexibility go hand in hand (Iiyoshi and Kumar 2008). Among several challenges we wanted to explore were these:

1. How do we make it easier or more effective for adult learners of all abilities to engage with OERs and to gain from that experience?
2. How do we make it easier or more effective for teachers to use, reuse, rework, and remix OERs for their own purposes?

A further factor was that to be of any use in testing what is possible, an initiative had to be of sufficient speed and scale to make the outcomes more robust and applicable than would be the case for a small pilot project. An $11 million, two-year start-up phase began in 2006. (For more detail, see http://www.open.ac.uk/openlearn/about-openlearn/about-openlearn.)

## DESIGN FOR FLEXIBILITY

So how have we faced up to these two challenges? Using the lens of design decisions, I will first outline the features and functionality that we thought would give learners and teachers the choices and the ability to effectively incorporate OERs within their learning and teaching practices.

I will then look at how learners and teachers have responded to what we have offered.

Four significant early decisions shaped our approach and helped us to keep flexibility for the users in focus. The first distinguished us from other sites: we decided to have two closely linked websites, one aimed at learners (the LearningSpace at http://openlearn.open.ac.uk/) and another at educators (the LabSpace at http://labspace.open.ac.uk/). By creating different spaces for different functions, we hoped to avoid mixing together the possible communities of practice.

The second decision was to go beyond having a store of content to displaying the content within a formal learning environment. (Moodle was chosen as the basis of the open-learning environment because the OU had decided to use it as the basis for its third-generation virtual learning environment [VLE]). Users could then variously engage with the content and communicate and collaborate with fellow users, and, in the case of LabSpace, upload revisions of our content or their own. We thus could treat LearningSpace as the safer, more robust site and use LabSpace for greater experimentation with tools and content, such as the use of video conferencing and knowledge mapping.

The third design decision was to avoid being too prescriptive about which educational content to publish. We chose a representative sample of study units from the breadth and depth of the OU's existing courses and programs to see what users found most interesting or valuable. There was also variation in the size and nature of these study units to again see what topics and forms users would find most valuable for their own needs.

Fourth, we wanted to provide the content in a number of different formats (currently eleven in total, including viewing online) and were able to do this because the OU was developing an in-house XML schema to provide greater flexibility in its new e-production systems. Again, this gave greater choice to users to manage how they technically used or worked with the OERs.

As well as these design decisions, we wanted to explore the differences between self-directed users of the OERs who had to make their own decisions about how to engage with them, and users who were supported in some way as part of an informal group or defined project. Thus, the support units in the OU were particularly important for engaging

hard-to-reach users, as they were already very active in providing information advice and guidance to prospective and existing students and were involved in a range of outreach and widening participation activities throughout the UK.

## OUTCOMES AND LESSONS FOR LEARNING AND TEACHING PRACTICES

The split of the site into two has generally worked well in giving a different focus for different users. Most use one or the other and not both, although most (over 90%) visit LearningSpace. Interestingly, those who do use both are much more likely to register for a regular OU course. Naturally, we were interested in how the OERs within OpenLearn changes practices other than Web-surfing habits, so we used a variety of methods—tracking, observation, surveys, and interviews—to explore this.

We tried to offer flexibility in choices by adding to Moodle functionality through a perpetual beta approach with four monthly releases of revisions and new features. We often had difficulty assessing the usefulness of some of these functions when frequently the only measure was apparent use rather than impact on practices. We had made an early decision to allow browsing users to see almost everything on the site but required registration if users wanted to use online functions such as instant messaging, posting to forums, and keeping learning journals. However, while we have had lots of visitors (100,000 per month at launch; now, three years later, closer to 400,000 per month) we have had far fewer registrants (200,000 over five years). This reflects the fact that most visitors come via search engines and seem to be "information seekers" rather than active online learners (although some so-called bounce visitors only go online long enough to download what they want—see below for more on this).

Testing of some functionality, therefore, has not been as effective as we would have liked because there are still not enough heavy users or because users did not immediately find the functionality appealing or of any use. For example, after two years, there had been minimal use of the instant-messaging software, so we dropped it. This is due in part to insufficient people being online at the same time, but it is also because most

users were not interested in such functionality. Cluster analysis of the characteristics of surveyed heavy users found that most were interested in content and assessment and seemed to be "volunteer students," with a smaller proportion equally as interested in communicating and collaborating with peers ("social learners"). In contrast to such synchronous technologies, the use of asynchronous technologies has become more popular, with the number of people using these technologies growing as more content is made available. In particular, the visibility and permanence of forum postings give other users value beyond that of the primary content itself. What has been more surprising and supports the theme of additional value is the number of registered users who are willing to make postings to their personal learning journal, sometimes very lengthy and in response to activities and exercises within units they have studied. That is, they liked the flexibility to augment the content they looked at, and sometimes made those entries publicly available to all users. But undoubtedly, just providing tools is not enough if users are not ready for them or do not see the value they might add to their teaching and learning practices.

These features are very closely tied up with a study unit. Others, such as the free video-conferencing facility (FlashMeeting) are greatly liked by some users, not as an adjunct to their study of units but simply as a useful technology in its own right. Other functionalities, such as users being able to create their own forums, which some users asked for and which we instantiated as learning clubs (modelled on book clubs), have been created but are not used seriously for learning by many users. Our research has shown that most registered users are happily working as individuals and not particularly wanting to communicate with others (that is, they like the flexibility to do their own thing without directly or immediately involving fellow learners).

Most registered users (over 90%) are not OU students; many of these outside users like the flexibility of mixing and matching the free and open provision on OpenLearn with their regular studies. Thus, they find some study material particularly interesting and useful in between their formal courses because it enables them to enrich their study and cover topics they could not fit into their degree program. Other students use forums, for instance, as yet another channel to make contact with others who are

studying, or about to study, the course they have signed up for (that is, they like the flexibility to communicate by whichever means they prefer—we have seen similar off-campus activity on social networking sites like Facebook). In other words, where social or group activity occurs, it is usually associated with existing real-world groups or social activity, and this is even more the case for people who would not traditionally expect to undertake higher-education study. It is clear from our experience that the less confident computer users and learners find an open facility daunting. However, guided informal study in community-based face-to-face settings has encouraged a growing number of women from Asian communities in the north of England, who do not traditionally enter higher education, to register for formal study with the OU or other local providers.

Teachers or educators appear to be similar in wanting support and favouring the familiar (Wilson 2008). We have variously added functionality that allowed registered users to do more in terms of reworking our own content or adding their own content to LabSpace, but the significant growth in such activity is largely due to existing groups within institutions who were given or already had permission and support to pursue such experimental activity. Again, there can be apparent flexibility in that it is possible to do lots of different things, but this flexibility to experiment is curtailed partly because it takes a great deal of time and partly because it is not technically straightforward for a novice (a consequence of our choice of technologies). The competence needed and the learning curve for those without that competence means that supported groups are more likely to succeed. Flexibility, in terms of an open invitation to innovate, requires a certain degree of courage, both for teachers and learners, and we have long debated whether to change LabSpace to a different technology such as wikis or blogs, which more people are familiar with. Even so, there are many courses now available from these external sources, and in one or two cases, educators have used their LabSpace course as a principal feature of a formal course they are teaching at their own institution. In other words, we are hosting much of the course content and activity away from the confines of an internal VLE.

A final lesson to report here is that formatting flexibility for content matters. One of the things we wanted to do was to make our own content available in as many formats as possible for download (as well as being

able to study on screen and online) so that users could choose the format they would find most useful. We began with only three formats (OUXML, the one we developed and from which all others are effectively generated; a plain zip file of assets; and a Moodle backup and restore, since we were using Moodle anyway) and have expanded to eleven (adding unit content XML, RSS feeds of unit content, an HTML print version, IMS Content Package, IMS Common Cartridge, SCORM, epub, and Word document options). We have also made downloading possible from both LearningSpace and LabSpace, not just LabSpace (although uploading is still only to LabSpace) and by browsing users, not just registered users. This has meant that after three years we were seeing over fifteen thousand printings of study units each week and around ten thousand downloads of all the other formats each week. So users like to take away our content and appear to like the flexibility of having a choice of formats, although it is interesting how popular hard copy (print) still is for many users. A bigger question and one we are no closer to answering clearly is, what are they doing with all this takeaway content and is it changing practices at all?

## CONCLUSION

So how do I answer the question posed at the beginning: do OERs add flexibility to how teachers can teach and how learners might learn?

OERs through OpenLearn are making a difference because they are raising awareness and giving choices where none existed before. People value access to high-quality educational resources when they want them. Often learners use these resources to fit in with their other learning activities, mixing informal and formal learning opportunities. OERs are beginning to change some people's practices, both inside and outside the OU, as access opens up options that were previously unavailable, but this has yet to gain significance in relation to existing educational provision. OERs appear to be gaining more traction with informal adult learners than with formal students (outside the OU), but mostly they appear to be in addition to or in support of existing informal provision and have not dramatically changed that provision (yet). In some cases, users are only prepared to

(initially) engage with OERs as part of a guided and facilitated exploration of higher-education study—a mix of face-to-face and online provision—while many are seeking ways to have their study assessed or recognized in some way.

What would we have done differently if we were starting again? We would have approached it purely from the social networking side and not the content side; we would have taken the content from existing provision and tried to provide the services that enable users to engage with the content using tools they are familiar with already rather than imposing a technological solution through a learning environment. (Actually, a separate OU project called SocialLearn, launched in late 2009, is attempting to do just that, but that's another story.)

What features could other OER providers take or replicate from OpenLearn? The answers are not definitive since even now, all this is too new for all involved to understand the impacts, but augmenting the existing content through forums and learning journals seems important, as does having material in a number of formats. The biggest message, though, is that whatever the intended audience, it takes focused measures and much time to develop communities of practice that are durable. These communities have to base their use of OERs in augmenting what they currently do, and they need help to innovate. Offering apparent flexibility does not necessarily lead to flexibility in practice.

So are we asking the wrong question? Is openness really part of flexibility, and is flexibility only suitable for the sophisticated learner and/or teacher because it requires confidence and competence? Do most people still like the comfort and safety provided by existing, less flexible, educational provision because someone else does the scaffolding work to make sense of an often complex and messy business such as education? I do not think it is the wrong question, but the answers are yet to emerge.

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## ABOUT THE AUTHOR

Andy Lane is still trying to make sense of the world and his place in it. He trained as a plant scientist but then moved into looking at the social-technical side of environmental problems. This led to him join a systems group, part of a technology faculty at the UK Open University, teaching and researching systems thinking and practice. Here, he developed an interest in the use of diagrams for capturing, representing, and facilitating knowledge and decisions. Having extended his activities with the systems group, Andy continues to try weaving together ideas about environmental decision making, systems thinking, diagramming, technological innovation, teaching, and learning, and he shares those ideas with others in ways he hopes are useful to them. He was director of OpenLearn from 2006 to 2009.

# 11 › From "Here" to "There" *The Rocky Road to Flexibility*

KAY MACKEOGH AND SEAMUS FOX

Many tourists lost in the back roads of Ireland, on asking for directions to their destination, have been mystified by a response along the lines of "Well, if I was going there, I sure wouldn't start from here." In the case of this chapter, "there" is a situation in which anyone can access qualifications and courses regardless of where they are in the world; "here" is the world of traditional universities that mainly serve students who study on campus. The provision of flexible access and new pathways to higher education, made possible by distance and e-learning, is the goal of national and international lifelong-learning policies aimed at upskilling citizens and enabling them to contribute to and participate in the "knowledge society" (see Brown, Anderson, and Murray 2007). Yet often the reality at the local level shows that there is a confluence of factors that appear to conspire to limit the potential for responding flexibly to the lofty rhetoric of these expectations. From where we stand "here," the pathway to "there" is strewn with many barriers, detours, and dead ends. So to what extent is it possible to actually get "there" from "here"?

As practitioners, we have over twenty years' experience in designing and developing distance-education and online programs in Oscail (www.oscail.ie), the National Distance Education Centre based in Dublin City University (DCU; www.dcu.ie), a traditional campus-based university. Like other distance-education providers, for many years Oscail offered flexibility to students in terms of location, duration, timing, and pacing of study. Over the last decade, we moved from first-generation, text-based distance learning to e-learning and online pedagogies. Meanwhile, the "mainstream" university continued to focus on full-time students and on its research agenda. In common with most traditional universities, technology was introduced to improve the quality of learning for on-campus

students rather than to increase access and flexibility for students who cannot be physically present on campus (Blin and Munro 2008; Fox and MacKeogh 2008).

Here, we focus on the often-difficult path to implementing flexible teaching and learning approaches in traditional universities. Our attention was focused on this problem because of a disruptive event that threatened the future of our distance-education centre: our state funding was withdrawn. To say the least, this situation placed significant demands on the flexibility of the university to react in a way that protected the interests of staff and students, as well as its mission to widen access. There followed a period of uncertainty, which, as we write, has yet to be fully resolved.

One response of the university was to explore ways of merging Oscail's activities and programs with those in the mainstream faculties, and we were given the task of developing a strategy for e-learning in DCU. This process involved identifying external drivers for adoption of flexible delivery of programs, including the European Union and national development priorities, as well as investigating the substantial barriers to implementation, including external funding policies, institutional supporting mechanisms, and skepticism about the quality of e-learning, combined with lack of awareness of its potential (MacKeogh and Fox 2008, 2009a, and 2009b). Engaging with the wider university community proved illuminating to us, not the least in revealing widespread support for the rhetoric of flexibility and accessibility, combined with a deep-seated attachment to the traditional model of students sitting in classrooms listening to lectures.

## SETTING THE SCENE

Before outlining our reflections on the journey that the traditional university faces in moving to a flexible, responsive organization, let us tell you, briefly, what the change in Oscail's funding regime represented. Oscail was set up in 1982 and received funding from the Higher Education Authority (HEA) of Ireland to deliver distance-education programs to adult students, in collaboration with all higher-education institutions in Ireland. This funding was "ring-fenced": that is, it could only be spent on distance-education programs and could not be used by the university for

any other purposes. Oscail developed a series of distance-learning undergraduate and postgraduate programs with, at one stage, over three thousand students and involving many hundreds of academic staff in the Irish universities and institutes of technology, who acted as subject leaders, writers, tutors, editors, advisors, and so on. In 2007, the HEA decided to review its funding for Oscail. The confidential report of the review panel described Oscail as "the driving force for open and distance learning in Ireland for a quarter of a century, bringing opportunity to thousands of students for whom traditional patterns of study were simply impossible." However, despite these positive words, the bottom line was that the HEA would no longer fund Oscail, claiming that distance education had been merged into mainstream higher education in Ireland and that dedicated funding for one institution was no longer warranted. While the background to this decision may be the object of future scholarly research, the impact of the decision was to throw Oscail and its staff and students into a period of uncertainty. Since Oscail had a quasi-faculty status within DCU and its staff were DCU employees, the university was also forced to consider its options—one of which was to close the Oscail operation and wind down its programs (the HEA subvention amounted to one million euros per year, representing one third of our income). Fortunately for many, this option was not the path selected. Instead, the university asked us (Kay and Seamus) to develop a strategy for embedding e-learning into the mainstream university and to propose how Oscail's expertise could be used to support the rest of the university in transforming their programs.

While the desire to secure the future of e-learning programs in DCU may have motivated the university in its response, its willingness to review its programs should also be seen in the wider context of the wholesale reform and modernization of higher education in Europe, which is driven by the Bologna process (www.ehea.info). Begun in 1998, this process now involves forty-seven European countries in a commitment to reforming higher-education degree structures, moving to a curriculum guided by learning outcomes as well as developing a transparent, flexible system that allows students to move between institutions and countries with a comparable system of qualifications. *Flexibility* has become a key word in all of this—as applied to learning pathways, duration of studies, and ways of designing the curriculum. DCU had actively embraced the

Bologna reforms and had embarked on a process through which all programs and module curricula were to be redesigned around learning outcomes. Flexibility was to be introduced in terms of pace and duration of studies, and choice of pathways.

Given the climate of openness to change in the university, it appeared to us (at first) that the time was ripe for the university to adopt e-learning and online learning as a key strategy in achieving the flexibility agenda. However, as we found, this was an unduly optimistic reading of the university's readiness to mainstream e-learning at this time.

## INVESTIGATING THE ROUTE FROM "HERE" TO "THERE"

From our analysis of the policy environment, we identified numerous international and national strategies for e-learning based on the need to upskill the population to meet the challenge of the information and knowledge society and the subsequent need for accessible and flexible access to tertiary education. We also identified the typical rationales influencing higher-education institutions to adopt e-learning, including enhancing reputation, developing information skills and literacies, widening access, increasing flexibility, increasing quality, and reducing cost and improving cost-effectiveness. In examining the internal DCU climate for adoption of e-learning, we held over sixty meetings and interviews with individuals and groups, and issued a questionnaire survey to all academic staff. Our findings form a useful counterbalance to the sometimes over-optimistic external rhetoric and suggest that there are many challenges to implementing fundamental change in how courses are taught in traditional campus-based universities (see the full report of our findings in MacKeogh and Fox 2008).

The qualitative consultation process identified mixed attitudes and awareness of the potential of e-learning. A small core of academic staff were enthusiastic and held significant expertise, while others were strongly skeptical, influenced by perceptions of poor quality, increased workload, loss of academic control and freedom, and lack of support from central functions. Concerns were expressed about the perceived lower esteem placed on teaching in comparison to research and the impact of lack of funding on quality. The quantitative survey was even more illuminating

(see MacKeogh and Fox 2008, 2009a). Extrapolating from 139 responses (a response rate of 25.2%), DCU academic staff appear to accept the flexibility agenda, with almost three-quarters agreeing that the potential to reach students in different geographical locations and at different stages in their learning lives would motivate them to teach online. However, other findings do not bode well for a positive reception for e-learning. Over half (56.7%) prefer traditional face-to-face lectures, while only one third (33.3%) would like to teach as many of their courses online as possible. A creditable 93 percent believed that individual modules could be taught online, but just 12.4 percent believed that complete undergraduate courses, and 21.8 percent that complete masters programs, could be taught online. Some survey voices may illustrate the basis for resistance in terms of fears about loss of control of intellectual property, negative views about quality, suspicion about management motivations, and lack of support:

> *Loss of control:* "Well I maintain a course webpage with course notes assignments etc. and provide continuous assessment results off that webpage. However I don't provide for forum discussion, submission of assessments online or recorded lectures. I prefer to see students face-to-face during lectures. I do not want my lectures recorded passed around and passed to students not registered for my class etc."

> *Quality concerns:* "There is no replacement for face to face teaching for producing outstanding inspired graduates. e-learning will not produce high-calibre personnel needed for research or high end industry. . . . e-learning will only serve to . . . promote further detachment from college life. I believe e-learning should be confined to peripheral/support roles for traditional learning techniques i.e. face to face."

> *Types of subjects appropriate for online learning:* "Teaching online teaching and stuff that can be memorized that's about it. The rest is perhaps better than nothing or an emergency replacement for real classroom work but it's always far more time consuming, less effective, and rightly dismissed by colleagues and administration as generally useless, except at least in theory as a revenue stream. Thankfully I'm not in the revenue stream business."

*Reservations about university support:* "Limited buy-in from top-management and teaching staff to online learning. Initiatives are at a low-level and not widespread; teaching/e-learning not aligned with core competencies of the university thus no strategic intent. Inadequate support structures no incentive for lecturers to change current teaching practices when emphasis for progression placed mainly on research."

## THE ROADMAP

Following our analyses, in July 2008 we produced a detailed report and recommendations for the university's senior management group. We recommended that DCU should adopt a formal e-learning policy that would include commitments to the embedding of e-learning; the establishment of enabling, training, and support structures; criteria for program development; and targets and criteria for adoption. We also recommended actions to increase staff and student capacity for e-learning; such structures would promote, develop, sustain, and integrate e-learning in DCU. Finally, we suggested alternative ways of securing funding. While the senior management group accepted that a learning-innovation strategy was a priority, they avoided a top-down approach. This was not surprising, as our analysis of e-learning implementation strategies in a broad range of UK traditional universities had shown that, with the exception of the University of Bournemouth (Hanson 2003), all universities we had studied had adopted bottom-up strategies (see Fox and MacKeogh 2008). Our report was published, without the detailed recommendations, as a consultation and information document for staff (MacKeogh and Fox 2008). Senior management recommended that the e-learning strategy process should be rolled into the overall 2009–11 university strategic-planning exercise, that we should continue to work with colleagues who were interested in developing online programs, and that the university should integrate Oscail activities and staff more completely into the university structures (preface, MacKeogh and Fox 2008). In effect, while the university agreed that a fully flexible university was a good thing to aim for, it was not prepared to dictate a detailed road map of how to get there.

For the next six months, we engaged in a series of targeted workshops, working with small groups of interested colleagues. We demonstrated a number of online pedagogical techniques and managed to stimulate some greater understanding of the potential of e-learning. However, despite the interest, we cannot claim that a critical mass of flexible online programs and modules are being developed as we write. Indeed, some recent proposals for accreditation of new programs persist in the classroom-based mode, even where the potential for a wider audience exists if flexible online delivery or blended methods were to be used.

How do we explain this reluctance to adopt truly flexible and accessible education? Some answers are more obvious than others. One major barrier is the lack of structures, funding, and reward systems to support staff development and training. From interacting with colleagues, we know that there is little incentive for staff to take on the extra workload that would inevitably result from increased enrolments and the adoption of more innovative teaching and assessment methods. However, even were adequate support and funding available, there is lingering skepticism about e-learning. For example, the president of DCU, in his blog on 19 May 2009, commented on the "often strangely unsatisfactory" impact of e-learning programs offered by some institutions, suggesting a return to the drawing board where a "new form of elearning, based to an extent on the social networking experience, is the way forward."

Some possibilities for future development may lie in the roll-out of the DCU Enhancement of Learning Strategy (Dublin City University 2009). Discussions on the strategy began in September 2008 with an advisory group comprising representatives from schools, faculties, and administrative units. With such a large group representing a range of interests, it is perhaps not surprising that a number of proposals that we had put to senior management failed to achieve overall acceptance. For example, we had identified a Deakin University policy which requires that all students take a minimum number of online credits as part of their program of studies (Armatas, Holt, and Rice 2004) and had made what we considered a relatively modest proposal that DCU adopt a similar policy. Instead, our colleagues rejected mandatory online modules in favour of a more evolutionary approach: "All programmes will be audited to evaluate the use of appropriate alternative pedagogical approaches such as e-learning,

collaborative learning, independent study and community engagement" (Dublin City University 2009, 14). However, we were somewhat more successful in persuading our colleagues to adopt a high-level objective of "advancing the flexible, responsive and accessible university." This objective included a commitment to redesigning "progression structures with the aim of building in increased flexibility on progression pathways for full-time students, and opening up new routes for part-time and distance education students" (Dublin City University 2009, 15).

The strategy committed DCU to four initiatives to be completed by 2011—that is, four years after the withdrawal of Oscail's funding:

- Identify existing or prospective DCU programmes that could be offered either fully or substantially online
- Analyse existing Oscail programmes with a view to integration into the Schools/Faculties of DCU and/or linked colleges, thus providing a critical mass of flexible programmes delivered online and aimed at off-campus students
- Procure an IT system designed to support non-standard progression routes and flexible programmes
- Establish a new institute incorporating Oscail, the Learning Innovation Unit and the education in the community element of DCU to spearhead the flexible delivery of programmes to a wider set of students. (Internal document, DCU Enhancement of Learning Strategy)

While this strategy has been agreed upon at a high level, the significant task of securing staff acceptance—even some enthusiasm—remains because without the co-operation and support of these academics and administrators, significant progress will be impossible.

## ARE WE "THERE" YET?

Higher-education institutions are now being encouraged, or indeed forced, to adopt more flexible approaches in response to national and international policy agendas (see Brown, Anderson, and Murray's 2007

analysis of national e-learning strategies). However, institutions may pay lip service to the flexibility agenda while signally failing to adopt any initiatives that might actually achieve such flexibility. As we have found, the pace of progress involved in changing a traditional university is slow: there are so many competing interests and traditions and so many levels of decision making. In the past, DCU, in line with many other universities, was satisfied to devolve much of its responsibility for flexible education to a separate unit while leaving the rest of its provision unchanged. However, the shock of losing funding for Oscail demanded a response from the university. That response could have included a decision to snap the connection; instead, the university chose to find ways of continuing to meet its commitments by involving the wider university community. However, after a year of consultation and capacity building, we're by no means "there" yet. Certainly, if we (personally) were to design the truly flexible and adaptive university, we wouldn't start with traditional universities, but given current funding and policies, establishing new institutions to meet new societal needs, while leaving universities to continue serving their traditional constituencies, is not an option.

There are, however, some potential positives on the horizon, perhaps stimulated by the cold economic winds affecting Ireland's previously dazzling economic success as the Celtic Tiger. Following over a decade of record growth, virtually full employment, and large-scale in-migration, Ireland faces rapidly rising unemployment. Its higher-education institutions are being asked by the Higher Education Authority to prove their contribution to upskilling and reskilling people who are in the workforce, out of work, or in danger of unemployment. The impact of the global economic crisis that emerged in 2008 has also concentrated DCU minds somewhat: "The university must play its full part in upskilling the Irish workforce and, in particular, to address the skills needs of workers affected by the current economic crisis. DCU must move as quickly as possible to maximise the flexibility with which it offers its programmes so that they can be undertaken by students who are either fully or substantially off-campus for the duration of their studies" (Dublin City University 2009, 16).

As practitioners committed to the concept of flexible access to lifelong learning and with long experience of the impact such learning has on

the lives of our students, we sometimes feel like those travellers of old who have returned from far-flung shores with tales of wondrous things over "there" that those who have stayed "here" refuse to believe. As we write, Oscail's programs are still recruiting students; we retain our faith in the potential of e-learning and continue to experiment with ways of improving our teaching. We are involved in various committees and working groups that, we hope, will eventually lead us to the goal of the open, flexible university, but we can only go at the pace that our colleagues are willing to adopt. It may indeed be better to travel hopefully than to arrive, but a few more companions on the rocky road would be welcome!

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## ABOUT THE AUTHORS

Kay MacKeogh has spent far too many years trying to change teaching and learning practices in higher education. Starting in the 1980s, she investigated the potential of distance education and new media, and how academic staff could be induced to adopt these exciting innovations. Almost thirty years later, she's still trying to find out why academic staff resist pedagogies that will benefit their own practice as well as their students' learning. She has developed considerable expertise in designing innovative programs and has published and presented many papers on pedagogy and policy. She escaped from the institution in April 2010, thanks to the Irish government's early-retirement scheme, and looks forward to many years of research and teaching for whoever wants to make use of her talents.

Seamus Fox has worked in online and distance education for over twenty years. More recently, he has been academic coordinator of Oscail's BSc

in Information Technology program and has overseen its conversion into a fully online program. His main research areas are online teaching and learning methods that promote higher-order learning and educational policies that affect e-learning. He is committed to finding ways to extend flexible approaches to education, even though economic, political, and institutional circumstances conspire to frustrate these objectives. In 2010, he was invited to take over as academic director of Oscail and is currently involved in implementing e-learning across the DCU campus. www.dcu.ie/~foxs/

# 12 › Where Has the Effort Gone? *The Quest to Sustain Momentum*

DARIEN ROSSITER

Recently, a colleague from outside of Cranfield University (www.cranfield.ac.uk) shared with me an observation about the institution: "You used to be doing some pretty interesting stuff, but we don't hear much of what you are doing now—it seems to have all gone rather quiet!"

And I had to agree. We really don't have many innovations to showcase, and the same familiar faces can be seen at the forums and user groups hosted across our institution. (I hasten to add here that we live inside two cultures: a traditional university culture and a defence forces culture; more on that later.) But when I've shared this comment with colleagues within my institution, I've had various responses. Is this necessarily a cause for concern? Has interest died away? Have people given up in frustration? Is it a timely wake-up call? Or is it just that we have reached a steady state, that the initial discourse over flexible, distance, and e-learning has settled back to "business as usual," enabling new educational principles and practices to be bedded down within the institution?

Certainly there has been a lot of effort over the years, but it has come in stops and starts and, for the most part, the enthusiasm and commitment still resides primarily with the few early adopters. In fact, some of the leading lights and early adopters have departed, feeling disenfranchised or even bitter about the innovation process as it has impacted them. There have been some winners, but actually the successes have been mostly in the past and even the "flagship" programs are beginning to look "a bit creaky," to quote another colleague.

So where has the effort gone? For a relatively small postgraduate university, we have devoted considerable resources to support flexible course design, development, and delivery, especially at one campus. On this one campus alone, we have three central service groups supporting various

aspects of flexible teaching and learning—one focusing on pedagogy, learning design, and academic staff support; one on design, development, and production of courseware (particularly high-end, large-scale customized programs); and yet another on specialized IT infrastructure and delivery requirements. Of course, the demarcation between these services is never quite so distinct, particularly from the customer perspective—which has led to a degree of confusion over who does what and on what basis. Questions arise such as "Do I go to department A or B for advice if I want to revamp my course?" and "Is there a charge for this service or not?" The answer, "it depends," and a suggestion to begin the request process again with a different service group are not especially satisfying from the customer perspective!

The degree of complexity is even greater because key IT services, such as our primary virtual learning environment (VLE) provision, are outsourced and because additional online development services are situated within academic departments. The organizational context is indeed a significant contributing factor to the efficacy of flexible-learning programs (Rossiter 2006), and ours is a particularly obfuscating one.

Why is this, and where are we in the flexible and e-learning journey?

As an institution, despite being involved with technology-mediated and flexible modes of learning for many years, we have yet to progress beyond Rogers' (2003) early innovative adoption stage (Rossiter 2007). This phase is characterized by pockets of enthusiasts in academic departments "doing their own thing"—some from personal preference, but others subscribing still to the "not invented here" position. There are those who are ignorant of what could be achieved, and yet others, quite honestly, argue they can't afford the time or the cost (where institutional charges apply). Not surprisingly, we have yet to reach a critical mass of user engagement with flexible learning, with approximately 54 percent of courses active on our VLE and 53 percent of enrolled students possessing VLE accounts.

## BARRIERS TO THE ADOPTION OF FLEXIBLE LEARNING

So what have been the barriers or constraints that have hindered not just adoption of the VLE and online usage but, more importantly, the

embedding of flexible and e-learning into institutional practice? I have identified four such constraints: distinctive cultures within the organization, exceedingly diverse learner characteristics, course development and student experience, and contextually derived conceptions of quality.

*Distinctive Cultures within the Boundary of a University/Defence Organization*

One of the most impermeable and resilient barriers is culture. Culture is widely acknowledged as a barrier to change within most organizations (Hrastinski, Keller, and Lindh 2009), and certainly within institutions of higher education, but ours has particularly complex overlays as we grapple with two organizational cultures—university and military or defence-related. Within the university, many academic staff, uncertain of and uncommitted to constantly changing futures, are reticent to relinquish the traditional course-development model (essentially a do-it-yourself approach) and to explore an alternative partnership model between academic and professional staff (learning designers, multimedia developers, and so on).

These academic staff, while appreciating the increasing demand for greater flexibility in course delivery, are trying to balance competing demands from research, consultancies, and teaching. They therefore tend to adopt a minimalist approach, typically a course conversion model that simply transfers a didactic pedagogy, with which they are familiar, to the online environment. The end product can be online lecture recordings with PowerPoint.

So rather than considering an alternative (for some, radical) partnership approach to course development, the sort of assistance these academic staff seek from support units is primarily administrative (e.g., copyright clearance) or technical assistance. This is akin to a procurement supply-chain process—an academic lead stipulates his or her "requirements" to the supplier with the expectation that the learning "product" will be churned out at the other end, preferably with minimal impact on academic staff time. In other words, the lecturer (as client or patron) sponsors the work but has limited appreciation of the professional skills or production processes required to complete the work. This is perfectly practicable if one is largely engaged in a course "conversion," but where this model falls

down is when there is a clear need to move beyond online course support to either a course-enhanced or a fully online or distance approach. Where the lecturer concerned has insufficient knowledge or understanding of flexible and online learning environments and fails to work closely with the professional-development support team, this schism is often reflected in poor learning design, inadequate learner support, and an overall impoverished learning experience for the student. If a fee-for-service model is imposed for professional course-development services as well, then the academic staff motivation and usage of such services clearly wanes.

From the military perspective, there is a degree of skepticism or wariness about an education and training environment that shifts the locus of control from teacher/instructor to student/learner. In this environment, there has always been a strong chain-of-command training and education ethos built on formal, top-down educational interventions. The culture, therefore, tends to resist, either implicitly or explicitly, an emphasis on self-directed or informal student-centric approaches, especially those that encourage learner-generated content or use of social Web 2.0 technologies. The suspicion that students are not learning while engaging with, say, blogs or wikis has led to a reluctance of some senior officers to sanction such learning activities while in the workplace. This transfers an additional burden back to students, who are forced to undertake coursework on their own time, whereas previously they were used to "being taught" during work hours.

So from the student perspective—particularly military students imbued with an instructor-led, learner-dependent, and time-poor culture—there appears to be insufficient introduction or ongoing support to scaffold the kind of flexible or distance learning that would enable a productive and rewarding learning experience.

*Diverse Learner Characteristics*

The vast majority of our learners are mature-age students, and while distance and online learning offers them greater flexibility in the workplace and in their lifestyles, many are not well equipped to be confident and successful independent learners. As a research-led postgraduate institution at Cranfield Defence and Security (www.cranfield.ac.uk/cds), we have an atypical student demographic in contrast to larger undergraduate universities, and this fact raises challenging student-support issues. In 2008–9, 85

percent of our students were enrolled in postgraduate taught courses, but only 21 percent were full time (the rest were enrolled in part-time or "flexible" mode). We also had a significant cohort (78% of our overall student population) enrolled in short courses, and this group had very limited time to develop the appropriate learning and study skills. In addition, not only did 15 percent of our students come from outside the UK, but they came from fifty-six countries throughout Europe, Asia Pacific, Africa, and the Americas, which raised interesting cultural and diversity issues. Significantly, almost 55 percent of our students were military and therefore came from a strong tradition of formal instructor-led face-to-face teaching. Not only do such students feel familiar and comfortable with a didactic pedagogy, but the peer support available through face-to-face training and classroom interactions has proven to be a significant motivator for their learning success.

Recognizing these needs, we have developed support programs to assist students with flexible and e-learning, including academic study skills and information literacy. For example, the information literacy online tutorials (diglib.shrivenham.cranfield.ac.uk/ilit) were a substantial investment on the part of our institution, involving two years of research and one year in development. Developed as stand-alone high-quality resources for time-poor students, they are accessible at multiple levels of subject granularity or sophistication, allowing learners to dip in and out with a light or a deep learning approach. The tutorials are non-compulsory support activities, designed to be highly interactive, engaging, and fun, but despite this we suspect they are still viewed by a number of students as additional work rather than essential skills to enable academic or lifelong learning.

Of course, we have student help desk services for IT assistance and VLE support, and seminars and programs to assist students in the use of electronic resources and library services. But recently, with a growing appreciation of the particular needs of our students, Cranfield has embarked on a comprehensive review of these services to ascertain how we can provide a more "joined-up" and effective service.

### *Course Development and the Student Experience: Successes and Challenges*

We have considerable experience in large-scale course development. We have a contract, for example, to develop and maintain for the Ministry

of Defence (MOD) UK what, to my knowledge, is still one of the largest-scale e-learning programs in the world. "Military Knowledge I and II" is an e-learning program for all British junior army officers comprising 156 high-quality, interactive lessons with well over one hundred hours of online study. This program has been studied at any one time by over two thousand students around the world. And for our taught courses, we have a rigorous quality-process framework for designing and developing courses (Scott and Cong 2007).

And yet, in my view, one of the greatest challenges we face at present is creating an integrated learning experience for our learners. As a distinctive postgraduate university, Cranfield is justifiably proud of its reputation for providing a quality student experience, characterized by small class sizes and personal attention. However, in our attempts to adapt this experience to an online and distance environment, I believe we have struggled to provide, in a consistent way, the equivalent high standard across all courses and modules to enable a cohesive student experience. In particular, we have yet to implement an integrated through-life program of student services, commencing with the marketing of courses and progressing through enrolment, induction, access to information resources, use of VLEs and online assessment, career advice, and alumni services. Our students grapple with different user system interfaces, processes, logons, and passwords, at times receiving well-meaning but contradictory information from different service groups.

Student evaluation of course quality is captured, but at times student feedback relates more to ephemeral experiences (whether they found the course entertaining or the cost of printing in the library) rather than a more rigorous assessment of the quality, appropriateness, or currency of the course content, structure, or learning activities.

*Contextually Derived Conceptions of Quality*

As an educational community, we have begun to engage constructively in a discourse about pedagogical considerations, learning designs, and appropriate choice of learning technologies, topics that underpin quality course development and delivery. However, what we are finding in places is an underlying mismatch between various stakeholders' conceptions of quality, in particular with respect to flexible and distance learning within

the context of the shared university and defence sector environment. Many within the academic community favour a higher-education conception of quality as "quality enhancement," encouragement of improvement in learning, where a high degree of responsibility resides with the faculty and with an academic course leader (Wright 2003). However, all the courses we deliver on behalf of the MOD must comply with an approach grounded in the principles of standards and audit (Higher Education Academy 2008). The MOD-endorsed strategic principles underpin all training management functions as a means to ensure that education and training meets operational requirements, to benchmark provision of training and education, and to provide a framework to develop and implement a Quality Management System.

This is certainly a challenging situation. However, the debate about quality in teaching and learning is not only a healthy sign of innovation maturity within an organization but is also of strategic importance to the future of flexible learning within Cranfield. How effectively this debate is managed as we move forward will be crucial. If we view the two conceptions, enhancement and assurance, as dichotomies, there is a risk that a negative tension will take hold among the various stakeholders, undermining the quality of educational courses and the relationships of those who develop and deliver them. Where such tensions go unchecked, the key values underpinning quality education—those of commitment, endeavour, and trust—tend to dissipate and to be replaced by indifference and attempts to evade institutional quality processes.

What is needed is a "whole of organization" approach, bringing together university managers, administrators, academic and professional staff, and our key customer, the MOD. The underlying principles of higher education and lifelong learning support the notion of quality enhancement, continually striving to improve educational outcomes. But there does need to be recognition of the essential part played by setting and monitoring performance against appropriate standards, especially with respect to the processes that underpin the student's overall learning experience.

Rather than an overemphasis or reliance on a top-down imposed quality-assurance audit process, I believe a different dynamic is needed to promote the creation of shared objectives for institutional improvement.

A dialogic approach is an inclusive way to achieve quality enhancement, to bring about a coalescence between the ongoing discoveries and developments that occur within disciplines in the academic environment and the business improvements developed by the managers of administrative systems (Higher Education Academy 2008).

A common theme has been emerging from this story: fragmentation of effort and commitment (at one time exemplified as a culture that valued individuality) can hold us back and, in some areas, has begun to dissipate or destabilize many of the early gains we made in flexible and e-learning.

## MITIGATING INTERVENTIONS

Two mitigating interventions are being pursued: formulating a new institutional strategy and actively building stronger collaborative environments.

### *A New Approach to Developing Our Institutional Strategy*

To date, Cranfield has been progressing loosely toward an emergent strategy with respect to flexible and e-learning (Mintzberg, Ahlstrand, and Lampel 2008, chap. 7). This is consistent with the journey taken by many universities (in the mould of learning organizations), as they move from a cottage industry and silo culture toward a more institutional and integrated model of flexible and e-learning.

At Cranfield, however, we have reached the stage where fragmented processes and competing aspirations are beginning to populate the space created by a lack of consensus and of a clear sense of strategic direction. Furthermore, as an institution, I feel we have been grappling with this uncertainty for some time. We have come from an era where the claim "we are not a distance-education institution" has been ingrained, and we have prided ourselves on the face-to-face experience and personal student attention. Yet, at the same time, we have developed substantial online learning programs and have established organizational units to support flexible and e-learning accordingly. But much of this, as is typical of early innovation stages, has grown in an ad hoc fashion, without a clear strategy to focus our efforts.

There are, however, positive signs ahead. We are, in a number of ways, well placed to develop a clearer strategy for flexible and distance learning. First and foremost, there is widespread agreement on the need to do so. We have a good understanding of some of the strategic drivers that have moved us inexorably in the direction of flexibility and student-centred learning (our mantra has always been "student focused"). Significantly, these drivers include the expectations and demands of our customers, particularly the requirements of our primary customer, the MOD. They also include a genuine desire on the part of many staff to enhance or improve the quality of our educational offerings.

But while there is generally consensus about *why* we want to implement flexible learning, *where* we are heading and *how* we will get there are still fairly hazy. In some quarters, they are even contentious. Furthermore, we now need to create a more widespread sense of urgency, particularly with some key decision makers, to see this process through the turbulent waters of strategy formulation. Inevitably, without a more developed strategic framework, policies and procedures are at best piecemeal and at worst counterproductive. One challenge we face is translating our previous successful student-centric teaching and learning into well-formulated and contextually aligned strategy, policy and procedures.

Given our complex organizational environment, sound policies to promote flexibility and quality in technology-mediated learning are required to establish the boundaries of decision making and control, but not so tightly as to constrain the responsiveness and adaptability required to personalize teaching and learning experience (Birch and Burnett 2009; Organisation for Economic Co-operation and Development 2005; Rossiter 2006). With some notable exceptions—for example, our policy on the use of the Turnitin assessment tool—our teaching and learning policies to date have not embraced the new modalities of teaching and learning. Few, for example, make reference to flexible or technology-enabled practice. While existing policies have been well suited to our long-standing campus-based culture, in many respects they are now proving to be lacking with respect to the complexities of our current environment.

We are therefore currently putting considerable effort into developing a new strategic framework to address the gaps and shortcomings that have emerged since our first entry into flexible and e-learning.

*Stronger Collaborative Environments*

The second intervention proposes the active fostering and building up of strong collaborative environments by rewarding those who cross organizational boundaries, break down the silo culture, and find new ways of working together. For example, we are examining ways in which librarians and information specialists can work with educational designers and learning advisors in small, subject-based teams, advising and consulting with academic staff who are developing or adapting courses. Furthermore, greater collaboration among colleagues working in staff development, educational research, and support units could improve our postgraduate teaching certificate program, and interdepartmental projects involving academic staff and leading practitioners could enhance research capability.

It is the promotion and strengthening of networks, communities of practice, and "spheres of influence" (Wheatley and Freize 2006) that create the energy needed to infuse creativity and good practice into an institutional milieu. A critical mass of such users can bring about solutions that address both the scalability and sustainability of educational innovation. At present, there are pockets of interest groups at Cranfield, but these have been relatively weak and have struggled to find momentum or traction within our institution.

To date, I argue that we have been focusing on adoption or uptake, not on the more mature processes associated with embedding flexible learning (Rossiter 2006, 2007). We have lacked targeted institutional policy and process designed to embed flexible learning into institutional teaching and learning practice, and to give newer modes an equal sense of legitimacy to that enjoyed by traditional face-to-face teaching. One such policy would aim to provide incentives for staff to engage with, even excel in, design and development of flexible-learning courses. Many staff are genuinely seeking help about how to engage more constructively with these challenges, although they are confused as to how to go about it. But we are responding positively. The school executive, for example, recently introduced a scheme to encourage good teaching practice with teaching-recognition awards.

Successful collaborations and co-operative ways of working can be sustained when there are agreed-upon institutional understandings and quality frameworks built around the student experience rather than

existing institutional processes or conventional practices of teaching and course design.

## THE FUTURE

The cultural, structural, and process issues I have highlighted have influenced our capacity to embed flexible learning, but it would be simplistic to suggest that this is the full picture. Cranfield is currently embarking on some major changes, and I sense there is both general recognition of the need for flexible learning and a commitment to take the next significant step forward in this journey. However, as Senge et al. (1999, 15) argue, "It is not enough to change strategies, structures and systems, unless the thinking that produced those strategies, structures and systems also changes."

How we change, how we think about flexible learning and what "student-centred" means in new electronic environments and within our dual-culture context, will influence how successfully we are able to embed the best of flexible and e-learning into our learning and teaching philosophy and practice. So now I feel our challenge is less about analyzing the question, "Where has the effort gone?" and more about answering, in an optimistic spirit, the question, "Where do we need to direct our effort for best effect?"

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## ABOUT THE AUTHOR

As a new graduate, Darien Rossiter moved from Sydney, Australia, to take up a position as a teacher librarian in Canberra, the nation's "bush capital." Seeking ways to satisfy her creative side, she has melded her somewhat disparate interests into a diverse career working in higher education, government, and industry as a media producer, educational designer, learning technologist, marketing director, researcher, and consultant. In 2005, she took a post at Cranfield University at the Defence Academy of the United Kingdom, where she was responsible for library and information services, e-learning, academic staff and student support, and creative design, portal, and web development. In 2010 she returned to Australia, where she is now responsible for the portfolio of academic programs and services for the diverse student population of the Open Universities of Australia. Her interests centre on organizational design and change management, but her commitment to facilitating quality learning experiences that motivate and engage students has remained constant. darien.rossiter@open.edu.au

# 13 › An Elephant's Lifetime, the Patience of Job

YONI RYAN

An elephant's lifetime and the patience of Job—that's what it takes to establish flexibility in higher education.

This paper is a personal reflection on flexible learning derived from my professional work as an educational developer and academic with a focus on new technologies. The context is Australia; the time period, from 1978 to 2009. The focus is on three themes that, in my view, characterize the story of flexibility, here and internationally:

- The interchangability from the late 1980s, of the terms *flexible* and *computer-based*, and then *flexible* and *online* in relation to learning
- The false prophets of flexibility
- The changing structure of the academic workforce

By 1978, in the tiny state of Tasmania, I was using print materials along with audio-taped "lectures" (punctuated with music and questions for reflection—an old-fashioned "mash-up," I suppose) in distance-education courses in a program in Australian literature. There, the very concept of distance seemed risible to one brought up with School of the Air (www.assoa.nt.edu.au/) in a large mainland state. Although my Tasmanian colleagues resisted "converting" their lectures to print, they reluctantly gave their (hand-written) lectures to office staff to type up and mail out to students, who had to be at least forty kilometres from the campus to enrol as "legitimate" distance-education students. We didn't call it "flexibility" then, and it was driven by our commitment to access and equity for those encountering difficulty attending classes because of family responsibilities, financial circumstances, or disability.

Over thirty years later, in 2009, I was involved in yet another university learning and teaching plan that directed staff to "adopt more flexible

approaches" to their teaching in order to respond to student needs for flexibility in learning. Now, the driver is student convenience, as more and more students reduce their time on campus in order to undertake paid work. Most of our staff at the Australian Catholic University exhibit the same reluctance to engage with the newer tools of e-learning as those colleagues of thirty years earlier, notwithstanding decades of institutional mandates and plans!

## INTERCHANGABLE TERMINOLOGY

Such resistance stems, I believe, from the conflation of the term *flexible learning* with *computer-based learning* and, since the late 1980s and early 1990s, *online learning,* as the wonder that is the Web rippled out from defence research applications to more general applications in education. Initially, the Web wave grew because of the potential for storage of and access to huge data sets and computational power, but increasingly, it is essential because of its communicative potential to broach boundaries of time and distance. The term *flexible* now conveys "convenience" with regard to access for the client/customer, and that inevitably means digitalization of resources and processes within the higher-education sector.

Yet early conceptions of flexibility, in the 1980s, encompassed a more holistic notion of how education systems and practices must change to encourage more students to consider "learning for life" and to accommodate difference and diversity in our societies. Typically, Australian and international definitions of *flexibility* emphasized the elimination of barriers to formal education. This conception, from 1991, characterized the range of practices that were encouraged by educational designers. I quote the following excerpt from a 1992 publication at length to show that technology is mentioned in only two items:

> Flexible delivery is an approach . . . which allows for the adoption of a range of learning strategies in a variety of learning environments to cater for differences in learning styles, learning interests and needs, and variations in learning opportunities.

Flexible delivery is characterised by:

- flexibility in terms of entry, program components, modes of learning and points of exit
- learning control and choice regarding the content, sequence, time, place and method of learning
- appropriate learner support systems
- the application of learning technologies where appropriate
- access to information on courses and services
- access to appropriate learning resources
- flexible assessment processes.

Flexible delivery finds expression in many ways including:

- the delivery of learning at a variety of locations including the workplace, the community or neighbourhood and the home
- resource-based learning with tutorial support
- the application of technology to enhance delivery or improve access opportunities
- the extension of educational opportunities through access programs, literacy programs, second and third chance opportunities for obtaining qualifications and bridging courses.

(Flexible Delivery Working Party 1992, 47)

Yet it took little time before higher-education managers seized upon the technological component of flexibility as the "silver bullet" to meet their challenges of restricted funding and competition between providers of higher education: "Strategically, operating flexibility can be seen as both an offensive and defensive tactic" (Kirkpatrick 2001, 164).

Flexible learning thus evolved into educational use of early forms of digital media, and ultimately into online learning.

*If* those of us working in staff development and educational technology had been more insistent that flexible learning was a pedagogical approach that was learner-centred and built on students' experiences, and not simply a technological fix to accommodate learners who were increasingly

impatient with the rigidities of university processes and "delivery by lecture," flexibility might have been achieved within the decade.

*If* granting bodies and governments had not been so dazzled by proposals from the false prophets of the Internet and had not thrown money at virtual universities, embryonic digital forms, and beta-version applications, and *if* programmers had not been more interested in technical innovation than solving teaching and learning problems experienced by the bulk of academic staff, flexible learning may have been accepted as an evolution of higher-education pedagogy.

*If* administrators had not assumed that the efficiencies and effectiveness gained through online administrative applications (such as enrolments, course information, and payment) could transfer easily to the teaching and learning that lies at the heart of universities (resulting in early "learning-management systems" that were simply digital content dumps), flexibility would not have generated the opprobrium that it has in the minds of academic staff.

*If* there had been fewer commercial providers anxious to capitalize—quickly—on the demand for higher education and training, seeing it as part of a globalization and market agenda, online education would have been seen as simply a component of flexibility, not its driver.

Instead, "flexibility" became, in the discourse, the revolution, the paradigm change in higher education.

## FALSE PROPHETS

If irrational exuberance characterized the stock market of the millennium's turn, e-enthusiasm infected the tech-bubble years of the late 1990s. Governments in Western countries, as well as granting bodies in North America, poured money into various digital projects that promised greater efficiencies in dealing with the massification of higher education. But such belief in technological solutions began before those heady years.

In Australia, during the late 1980s and early 1990s, the advent of video conferencing was touted as the solution to expanding student choice, as it allowed for the teaching of small cohorts on rural and distributed campuses. Of A$2.785 million of the National Priority Reserve Fund in 1990,

A$1.85 million went to video-conferencing infrastructure in rural universities. Only A$50,000 that year went to non-computer-based investment (Australian and South Pacific External Studies Association 1990). In the event, the technology quickly became the mechanism of administrative communication or languished unused, with staff and students alienated by the different presentation and reception skills required and by the clunky technology of the time.

CDs and then DVDs aggregated more and more data, particularly graphics and sound, onto portable discs; universities "converted" their print materials into digital forms. Post office charges dropped for those universities offering distance programs; non-distance providers saw expansion into distance as a financially viable option, with little outlay for increased student enrolments in an increasingly stringent public-funding era.

Then, in the early 2000s, m-learning (mobile learning) became the next new thing—studies into the use of mobile technologies, specifically mobile phones, extolled the notion of the borderless campus and ubiquitous contact with students (Peters 2005), as education moved into the workplace. Online learning arrived—initially also data dumps for static text but more recently, a cornucopia of possibilities: synchronous chat (not so "flexible," but "live"), discussion forums that overcame the loneliness of the long-distance student, video clips, animations, links to rich resources, and "mash-ups" (as in Web 2.0 jargon).

Social-networking tools and Web 2.0 are today's addition to the list of tools that will change higher education forever. Advocates promote commercial applications such as MySpace, YouTube, and Twitter—although the potential of the last to contribute to meaningful knowledge construction with a 140-character limit suggests a degree of inflexibility! Podcasting of lectures has been proposed as the next big thing in freeing students from the campus timetable (as cassette recordings of lectures were touted in the 1980s).

None of these technologies, of course, would have gained the traction they have within higher education without the prophets who sang the song of the education revolution. Often, these were commercial vendors intent on finding a market for new and increasingly sophisticated applications. John Chambers, CEO of Cisco Systems, famously announced that e-learning was the "killer application" of the Internet and would make email use look like "a rounding error" (quoted in Henry 2001).

The reality in 2011 is that both online materials and email have become integral to higher education, but we still have no definitive studies on the value of each to higher-education learning: we just know that they are inextricably bound into our contemporary experience of higher education. For students on campus, online resources and email are integral to their study; for those off campus, at least in the Western world, online learning may be the only means of access to formal education. Yet return-on-investment studies are rare.

In Australia, in 2001, Dale Spender, an early enthusiast for immersion in the digital world, warned that students would desert an ossified university sector in droves for private providers because "customers" would be given what they wanted: "service and career enhancement," along with excitement and enthusiasm (Australia Department of Education, Training and Youth Affairs 2001, 20). Instead, both on-campus traditional universities *and* private providers have flourished. Eight years on, prophets such as Nolan (2009) were still predicting the demise of campus-based education, not only because of a lack of flexibility in timetabling but because lecturers do not make time for students (but that's another issue entirely).

Consider a roll call of just some of the online prophets and projects that have fallen into the "www" (What Went Wrong?) category. In Australia, spectacularly, the University of Melbourne had Alan Gilbert. Gilbert touted Universitas 21Global, which partnered with Thomson Corporation to take prestige university online education to the world (Ryan and Stedman 2002). With initial funding of £50 million, the model was to have a standardized curriculum (e.g., Maths 101) developed by a star professor in gaming format. The mode of delivery would appeal to digital natives through immersion modalities and would be supported by a global network of young tutors operating in each time zone and flexible enough in their work commitments to provide 24/7 help. Ten years after this visionary online global university was announced by Gilbert, U21Global had shrunk to a graduate business school (Indian-owned) mainly offering certificate-level courses in the sub-continent and Southeast Asia. Millions of pounds of investment were lost by the four UK university partners alone. Thompson Learning, following the lead of News Corporation, the original commercial partner, pulled out in 2007. Enrolments languished;

course quality was questioned. The University of New South Wales and the University of British Columbia withdrew.

Grassroots academics rightly wince at such losses when many warned against the model, as indeed many cautioned against the UK e-University, which ignominiously closed in 2004, having squandered £50 million to attract nine hundred students.

Other failed schemes need recording: NYUOnline, Scottish Knowledge, Fathom, the National Technological University, and the University of Illinois Global Campus. The latter had projected 9,000 students by 2012 and 70,000 by 2018; in early 2009, it had 500 after a US$7 million investment over two years. Kolowich (2009) reports that faculty resistance to having their courses "sold" for profit and delivered by adjuncts doomed the project. That relates to my third theme, explored below—the changing structure of the academic workforce.

Of the fifty or so "virtual university" companies listed in the various "borderless education" reports (Australian and UK-based) of 1998 to 2006, over 80 percent folded because they were starved of state funding or commercial investment and failed to attract paying students (Ryan 2008). Part of the problem was the extravagance of the claims made by e-proponents—Chambers on the millions to be made from online education, Spender on the death of the printed text, and Gilbert on the putative attraction of prestigious universities moving into online education and of an immersive-learning model.

Academics are notoriously skeptical of such rhetorical excess. Witness some of my own paper titles on e-learning:

"The Tiger's Tail: The Convergence Dilemma" (Ryan 1997a)
"Virtually There? The Global Electronic University" (Ryan 1997b)
"Higher Education: Infected with a Millenarian Bug?" (Ryan and Tapsall 1999)
"Borderless Education After the Dot.com Crash" (Ryan 2002)
"Learning about E-learning: How Long Will It Take?" (Ryan 2003)
"Do You YouTube? Wanna Come to MySpace?" (Ryan 2007)

By training, academics are skeptical creatures—they know it takes the university time to digest the technologies it ingests. To enthusiasts, this

attitude is merely denial: "For some teachers, the technology revolution of the last 30 years was, and is, an epiphany, but for some faculty it remains an enigma, at best a fad, and at worst a threat" (Batson 2009).

While I have met more than my share of King Canutes in academia seeking to turn the tide against technology, it is not merely denial. Another factor is at play, which leads me to my third theme.

## THE CHANGING STRUCTURE OF THE ACADEMIC WORKFORCE

It is the extraordinary convergence of pressures in the late postmodernist, neo-liberalist world we have inhabited since the emergence of mass uptake of the Internet—which in turn coincided with micro-economic reform and management drives toward more "flexible" workforces—that has also stymied the uptake of flexibility. Part-time, casual, fixed-term contract staff became common in North America, the UK, and Australia during the 1990s. Half of the US's tertiary teaching is now undertaken by casual staff (*Chronicle of Higher Education*, 23 October 2009). In Australia, the estimate is between 50 and 80 percent. Economic "reforms" and decreased funding for higher education drove this move to contingent staff, but it coincided with the dramatic increase in online resources. When the term *flexible* gained this neo-liberal connotation of expendable, contingent, and casual staffing, the positive aspects of the term *flexibility* as applied to student convenience were undermined. If to management, *flexible* meant a casualized workforce, why would flexible learning be embraced positively and enthusiastically by staff for the benefit of students? And why would academics, convinced (unrealistically) of the value of their intellectual property in curriculum and the ideal of university decision making as a consultative, deliberated process—the equivalent of the slow-cooking movement, to my mind, honoured more for nostalgia than for practicality—support such flexibility, when its own workforce was atomized? Herein lies a related problem for sustained flexibility in higher education.

It is not merely the "not invented here" syndrome that prevents staff from using online resources, although there is some evidence otherwise. The open educational resource, or OER, movement (see Andy Lane's

chapter in this book), while heavily promoted in the UK in particular, has not been overwhelmed with demand—or resources, for that matter. Fewer than 10 percent of visits to MIT's OpenCourseWare website are from teachers—85 percent are from students (http://ocw.mit.edu/about/site-statistics/). Merlot resources are routinely "unrated" by other staff, and I have yet to persuade one academic to integrate them in their teaching—and see Caris 2004. In Australia, neither EDNA (Education Network Australia, www.edna.edu.au/edna/go) nor Ron Oliver's online resource bank for ALTC (www.altcexchange.edu.au/) has been swamped with voluntary offers of materials (www.altc.edu.au/resources). Indeed, EDNA closed its higher education resource bank in 2009 owing to lack of use.

What is neglected in calls for all academics to reuse others' resources is the fact that teaching is as much a creative act as a transmission of certain knowledge/skills/values. We speak today of a "constructivist pedagogy" wherein our students construct their knowledge of the world out of theory and experience in order to create knowledge sets specific to them (although, as Laurillard [2001] reminds us, within the bounds of received and tested disciplines). Why would we not wish our academics to construct their own resources and approaches to their expert knowledge?

## CONCLUSION

Batson (2009) argues that educators cannot be resistors to the disruptive paradigm consequent on digital technologies. Certainly, there is some element of Luddite resistance evident in our universities, but I don't know anyone anymore in universities who rejects the lure and lore of Web-based treasure. Bemoaning the additional load created by email, we could not live without it. Mobile phones with email and Internet access are essential for those like me whose work stretches over six campuses and four states and territories.

So I return to my original question: how long will it take to embed flexibility in higher education? Batson concludes that with Web 2.0, "we have yet to find a new stasis, nor will we for perhaps another century or more." So we do indeed need an elephant's lifetime, the patience of Job.

One final point. Personally, I do not separate the "e" from learning anymore. The technologies are changing so fast that it is not even useful

to make predictions about how we can use Web 2.0. I prefer to revisit those typical early definitions of *flexibility*, the ones that emphasized learner-centredness, more choice over entry pathways, information on courses and services, and second- and third-chance opportunities. There the student, not the technology, is the pedagogical driver. That's a principle worth our patience.

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## ABOUT THE AUTHOR

An early childhood in remote western Queensland with female relatives who had little formal education left Yoni Ryan with a lifetime commitment to distance education as a means of access to learning, especially for women. As technology has evolved from mimeographed notes to social networking, she has been forced to question whether the technology is driving education policy and processes, rather than being a tool for learning. She has become deeply skeptical of technophile claims and the delusions of institutions about the profits to be derived from online education but remains committed to the principle of access. She is now Professor of Higher Education at the Australian Catholic University, with responsibility for flexible delivery policies and practices. http://apps.acu.edu.au/staffdirectory/?yoni-ryan

# 14 › The Garden of Learning Delights
## *The Librarian's Tale*

NON SCANTLEBURY AND GILL NEEDHAM

We begin by introducing ourselves. We are a pair of humble librarians, one long elevated to the dizzy and somewhat stressful heights of senior management and strategy, and the other walking the tightrope of library middle management. Both of us continually strive to keep our feet firmly on the forever-shifting technical and political ground. Both are driven by the desire to support the library profession to move toward engaging in truly collaborative models and workflows for creating distance-learning programs offered by one of the world's largest distance-teaching universities, the Open University based in the UK (www.open.ac.uk). This is our story, and depending on whether you feel the challenges we continue to face globally in crafting engaging and economically viable distance education are exhilarating or terrifying, we hope you might be able to identify with our cause.

We had a dream. In our dream, a group of eager students with bright eyes and bushy tails, hungry for knowledge and inspiration, find themselves in a beautiful garden. At first, they wander around together, marvelling at the richness of it all—many sights, sounds, and aromas. Soon, however, they disperse and each begins to select from the abundant range of succulent fruit and dazzling flowers. The more they pick, the more different varieties are revealed—for each student, the possibilities are endless. Moreover, for students requiring some guidance, kindly fairy gardeners are at hand to give support and advice. Like the garden itself, the students begin to grow and flourish, both individually and as a group.

Then we had a nightmare. In the nightmare, the same group of eager students, hungry for knowledge and inspiration, are trapped in a dark and gloomy dungeon. Peering through the gloom, they see a pile of identical brown paper parcels, which they begin to unwrap, revealing some neatly

stacked, wholesome sandwiches. Glimmers of light appear through the windows and they can just make out some colourful fruit-laden trees over the horizon—but there are bars on the windows and the doors are locked.

Librarians play an integral role in the learning process. Working in partnership with academic colleagues and learning technologists, they can facilitate the creative employment of a massive and varied array of resources. As librarians, our vision of flexible learning focuses on the opportunity to enrich, enhance, and diversify the students' experience as truly independent learners through access to increasingly rich and sophisticated learning materials. In our garden of learning delights, the student is empowered to find, select, and evaluate resources to support and extend their learning, with an increasingly interactive experience facilitated by the ubiquity of the Web and the impact of Web 2.0 technologies. In this scenario, the roles of both academic and librarian change as both assume a responsibility for helping each learner to develop the skills for navigating the changing information environment and making sense of all that is found. However, not all is flourishing in today's garden of learning!

The Open University in the UK has been supporting students as independent learners for forty years. For the first thirty years, the student's course materials consisted of a range of high-quality resources—print, audio, and moving image—pre-selected and provided "in the box" (with support from specified broadcast material in the early years). Most students graduated without any experience of using a library or, indeed, being required to seek, find, select, and evaluate information for themselves. There was, of course, good reason for this: library access was at best problematic and at worst, for many, impossible.

Students' access to the Internet changed all that. A massive investment in electronic collections and the development of sophisticated virtual services enabled all students to have access to their own online library, tailored to the needs of their courses and programs, as well as the largely unstructured but wide-ranging resources of the Web.

But in the dark ages of the last century, the structure and culture of Open University courses did not easily accommodate the use of library materials and the development of information skills for our students. Indeed, the idea of encouraging students to find information themselves to inform their studies was anathema to many individual academics and

course-development teams. They were not at all sure that they wanted their students to enter that garden—it was much too dangerous and beyond their control. They argued that the students were quite happy where they were, often fully dependent on information pre-selected and organized by academics in the course-development teams.

And as the librarians slipped into their dreams, so the crusade began. The librarians of yore donned their best armour, mounted their trusty steeds, and set off to beat on the doors of the castle of distance education. Bringing their treasure chests of learning delights, they hoped to dazzle the custodians who produce the learning elixir and hence delight the learners who consume it. The journey was long and treacherous, and some entrances to the castle were blocked by impenetrable iron doors: they encountered the first-level alchemy course team, who feared that the librarians' treasures would pollute the purity of their elixir, and the ancient philosophers, who said the treasures would dazzle the learners and lead them into dark and dangerous waters. Even some of the more welcoming course teams were worried that the librarians' treasures would distract the learners and take up too much of their time—they didn't understand that the treasures could be added to the elixir from the beginning, creating a richer mix and saving time in production. Worst of all were the fearsome dragons, who thought that librarians should stay in their book tower and not interfere with the pedagogues. But despite all the obstacles, they persevered, and as the years passed, more doors began to open and they were welcomed inside, sometimes with open arms.

The quest had to continue into the twenty-first century and expand into broader territories and communities. The trusty but, by now, world-weary band of librarians was joined by newer and younger recruits and by a growing band of wizards and magicians, bringing new treasures for the garden, like wonderful baskets of images, sounds, and movies, and a box of magic spells, including virtual tours, tutorials, and chat services. There were victories, large and small, along the way, and many more learning custodians were friendly, but there were always obstacles to overcome. Some were humans.

Various kith and kin sought to vanquish the brave attempts of the librarians to muster the forces that could lead to the true embellishments and allure of the garden of learning delights. These included a small band

of impish folk such as those typified and led by Hurste and Woller. Hurste was renowned for railing constantly at the forces of the castle establishment and had established a fearsome reputation among the librarians and his kinsmen for his adept and nimble technical skills (through blogging, tweeting, and many mash-ups). Hurste could be both gentle and fearsome, depending on his mood, but though often Pan-like in his approach to subverting the forces that constantly tried to subdue him, he had more in common then he realized with the librarians in how he sought to support learners to gain access to the abundant resources in the garden. Hurste could often be seen scaling the walls of the fortress called "distance education" and was sometimes successful in convincing the influencers (the rulers, strategists, and treasurers who held the real power) that things in the castle had to change. The librarians could, in fact, learn a great deal from Hurste, who could find different ways into the castle using his skills in producing different flavours of elixir, which, if combined with the librarians' treasures, could really help to propagate the garden.

Woller believed in his heart that the influencers often connived with the bean counters and the facts-and-data suppliers, and worried about the sustainability of their business models and their effect on the learners. Though gentler in his approach than Hurste, he would often proclaim through his blog the virtues of freedom and democracy in learning, with students not needing any direction or professional advice from librarians. The influencers and many librarians found such arguments disturbing because they believed that the students would need help in unlocking and using the treasures.

The librarians particularly were alarmed at the very thought that their codes and practices for organizing the seed farms via their catalogues and metadata profiles for the twenty-first-century learning garden could be challenged by such sacrilegious railings. On one particular occasion, Woller even had the audacity to challenge the very foundation of a particular branch of their code called "bibliographic management," calling the very foundations of the code an anachronistic, deliberately complex, and antiquated attempt to confound and befuddle the learners seeking their way into the garden. Woller wanted instead to standardize to one citation style for all types of treasures, sweeping away decades of practice by scholars and librarians.

To cap it all, Hurste and Woller poured derision on the librarians' attempts to document and code the seedlings in a way to ensure that everyone could find them again through the librarians' catalogue. The very idea of challenging the foundations of the librarians' sacred code caused upset through the entire library community. The chieftains protecting metadata standards could often be seen polishing their XML weapons, ready to meet the impish folk head on in the battle to establish standardization in the garden of learning delights. These chieftains had only just lost a battle to the vandal Weinbergstein, who had come up with the idea (a ludicrous one, in the librarians' minds) that learners would and should code any learning material they found with their own terms. Anarchy would reign. Imagine what that would look like in less than no time! The librarians might have lost the battle because Weinbergstein had a powerful way with words in more than one respect, but they were certainly not about to lose the war. Unfortunately, the chieftains were not blessed with oratorical powers. Academics and learners seeking their advice on how to enter the garden using the metadata profiles often looked puzzled or even fell asleep as the chieftains talked. Some of the librarians were also bemused by the dark arts of metadata and XML weaponry, though of course they would never, ever admit it in public.

As the holy World Wide Web became more and more anarchic and profligate with its treasures, the librarians were more determined to seek resolution in the sanctified scriptures of metadata. However, the learners and the impish folk led by Weinbergstein, Hurste, Woller, and others not only ignored their pleas but themselves searched for quick-fix ways into the garden.

The librarians' dream garden was so near, yet so far. For those who could see the dream, it had become so clear to them that managing and standardizing the metadata would be the key fertilizer for the garden of learning delights. Metadata would be the key to unlocking, revealing, and delivering the seedling treasures and would enable the learners to seek, retrieve, share, build, and preserve the growing body of knowledge being propagated in the garden.

So where did this arguing leave the learners, who remained confused and befuddled while the librarians, the influencers, the impish folk, and the academics attempted to impose their views? It seemed to learners that

these university staff communities, who purported to help them find their way to the garden and grasp its learning delights, were more engaged in their own prickly arguments and boundary disputes around the periphery of the garden itself. Not all of them, of course—there were always exceptions to the rule. Tribal gatherings like Information Service Committees and Coalitions could see the abundance of knowledge and wisdom that could be gained by accessing the garden. They would have no truck with the anarchy emanating from the holy World Wide Web and could see that to continue to protect it would bring them no luck or fortune.

Librarians and others began to forge new tribal coalitions with these protagonists for change and started to work together to demand a new transparency in the castle called distance education. They wanted to understand why people were imprisoned by all these arguments, and they wanted to liberate them. They wanted access to the old seedling records alongside the new codes, but most of all, they demanded that the librarians, strategists, bean counters, impish folk, and academics stop squabbling and work together. They wished to harness the diversity of learning resources and build new and exciting types of learning experiences. Particularly important was the development of the skills learners need not only to find and access the garden but also to toil within it, manage its resources, and propagate it further, extending its depth, breadth, and richness.

Such work could only be sustainable and possible through a mixed economy and new equal partnerships between the learners and all of the folk responsible for the garden and its treasures.

Through our tale we have attempted to touch on some of the real territorial and political obstacles and battles that are often recounted to us by academic and library colleagues in our own and other institutions. Through our own quest to maximize flexible and effective use of diverse learning resources designed for independent use by learners, we have learned some valuable lessons and we have a few successes to share.

We have learned that, like in the garden of learning delights, as library practitioners and professionals, it is crucial for us to find ways to work together across the existing diverse communities of practice that support education. The immense influence of the Internet, which has liberated access to resources and requires new types of media and

information-literacy skills, will inevitably force our existing professions to re-examine themselves in terms of what they bring to learning support and development in the context of flexible delivery. In order to help this process, we must capture, document, share, and promote examples of good practice in terms of how we collaborate to develop and design learning and skill building for independent, inquiry-based learning. If we are to succeed in fostering reflection, critical evaluation skills, and the broad range of literacies that are at the core of developing independent citizens, we can only do so in partnership with our colleagues and learners in a truly collaborative model. Not only are there ethical drivers for this partnership approach, but the global economic situation, national educational policies, and cultural drivers will inevitably force change.

At the Open University, our library colleagues have begun to collaboratively challenge and re-energize learning programs. We now work proactively, on the ground, with academics, learning technicians, and learner support staff during course design and development of learning resources. We are also involved in prototyping and developing new services that support interactivity and dialogue with learners. Examples of good practice include the drive to embed information literacy within programs rather than individual courses, which will encourage dialogue among students, academics, and tutorial support staff and help to build up knowledge and information-management skills. The Faculty of Health and Social Care has adopted this model and seeks ways to prototype different types of Web 2.0 tools and approaches alongside the virtual learning environment toolkits that sit behind the organizational firewall. The faculty is actively encouraging both staff and students to experiment with open resources, along with library-managed, third-party, licensed material, in ways that enable the embedding of skills and content to aid independent learning.

We have also been proactive in seeking opportunities wherever possible to engage in research and development. These days, seeking internal and external funding is a way of life for most professionals, who need to find revenue streams to build capacity. As organizational resources become increasingly scarce, the need to collaborate across institutional boundaries and within global contexts will become even more crucial. We have pursued a range of research projects that fit within the strategic framework of the organization, and through energy, commitment, drive,

and a spirit of risk taking in a largely risk-averse profession, we have sought, received, and used funding to create new initiatives and projects.

This pursuit of research and development activities, balanced with the mainstream activities of the academic-support librarians, has given us the tools with which to cultivate our own learning delights. These opportunities would have been the poorer without all the close collaboration with learners, academics, managers, funders, project managers, technical critics, metadata specialists, archivists, librarians, and learner-support staff that has fostered such diverse development and innovation.

In our tale, we have reflected on our internal battles and victories over a decade, but during this time, the information world in which we operate has turned upside down. The Web has had an unprecedented impact on the way in which traditional librarians have performed their professional duties. The growth of repositories and the current interest surrounding the possibilities of mobile learning, digital textual analysis, and e-books are opening up new possibilities for engaging learners with content and skill building in new contexts. Many librarians working within education now need to broaden their expertise and knowledge into the field of learning development and design if they are to effect promotional use of library collections for online learning and flexible delivery. It will be increasingly necessary to participate in working with the technical developers and semantic experts to build more agile systems and services that can guide academics and learners to high-quality expert mixed-media collections, either free or licensed, in order to exploit and create their own gardens of learning delights.

They will also possibly, even regrettably for some, have to develop more project-management and broader data-management skills. Such skills will enable them to seize opportunities for experimentation and innovation in order to work with practitioners, academics, researchers, and learners to build engagement and long-term sustainability with the rich collections at our disposal.

We fully acknowledge that, as a profession, we need to change, reinvent ourselves, and abandon many inflexible practices of the past in order to make our dream garden a reality for our learners. But how prepared are our academic and managerial colleagues to see beyond the stereotype, acknowledge our skills, listen to our arguments, and join us as equal partners in developing and fully exploiting the garden of learning delights?

More importantly, are you, as a reflective practitioner reading our tale, prepared to see anarchy reign in your garden, or will you get involved in helping learners discover its delights?

## EXAMPLES OF OUR PROJECTS AND INITIATIVES

### *Working with Social Networking Tools*

The CLUSTERS Project

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The DEVIL Project

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## ABOUT THE AUTHORS

Attracted by the dark arts from an early age, Non Scantlebury started out studying for a degree in social anthropology and South Asian history. This opened her eyes to the similarities and diversity of human rituals. She discovered that a pattern existed where cultural engagement and interpretation coalesced and manifested itself through a range of shamanistic behaviours and knowledge exchanges. As a qualified librarian, Non then entered the world of media librarianship and observed much bizarre and perverse ritual behaviour relating to the disclosure and concealment of things called "facts and data." These practices often varied greatly, depending on who happened to be the most powerful shaman of the day. Non then trained to be a teacher and has been lost in the wilderness ever

since. Officially, she is Head of Library Research and Innovation at the Open University (UK) Library Services.

As a child, Gill Needham loved libraries. By the age of seven, she had instituted a loans system for her book collection, complete with tickets and date stamps. She then became distracted, spending three years on barricade duty, occupying various university buildings to the strains of Led Zeppelin while pretending to be studying English and American literature. With limited career opportunities for hopeless idealists, she yielded to the lure of librarianship, creating chaos in a number of institutions due to a distinct lack of the requisite attention to detail. She has tried on various hats for size—researcher, evangelist, teacher, and manager—ending with the heavy and sometimes ill-fitting crown of senior manager, a burden only eased by the talents and inspiration of her team. She is currently Associate Director of Information Management and Innovation at the Open University (UK) Library.

# 15 › Reflecting on Swamp Life

ARTHUR L. WILSON

The charge has fallen to me to provide comment on the foregoing "swamp" chapters in order to draw out some of the themes of flexibility and power in practitioners' experiences in developing flexible-learning systems. The editors of this volume asked me to conduct what they referred to as a "meta-analysis" of the practitioners' accounts. At first I demurred because I did not feel qualified to comment from an academic perspective in a rigorously scholarly manner, but the editors assured me that they were more interested in my observations as an adult educator on the theories and practices of flexible learning.

So let me begin with a disclaimer. I am neither a student of flexible learning nor a scholar of distance education. But as a practicing adult educator in several settings, such as adult-literacy education, adult-education staff development, continuing professional education in several professions, and adult higher education, I have been involved with various forms of distance education and flexible learning. I well remember, for example, in the early 1970s in the rural state where I first began working as an adult educator, helping to make audiotapes of lesson plans for adult basic education and General Education Development (GED), a high school-equivalency test preparation. There was a centre that managed the tapes and a toll-free telephone number for people who wanted to learn but could not get to the adult-education learning centres. As I became more involved, I learned about early efforts in the 1960s in Canada using television in rural areas to create access to adult education. I even remember some very crude versions of distance education in the United States at that time. Televized GED preparation programs became a significant phenomenon in the 1970s. These early experiences got me to thinking about the question of access, although it was many years before I was able to put form to the thought. The ongoing question of access is a persistent one in

the swamp chapters; I hope to show that there are continuing tensions in the understanding and deployment of the concept of access.

In the 1980s, and more so in the 1990s, I had experience with various forms of teleconferencing through closed-circuit, two-way interactive television as well as taped versions of actual classroom activity for later television broadcast. One of the insights of the swamp chapters is that flexible learning is not simply a function of making learning materials available or of videotaping educators doing what they do in front of a live audience, a lesson I clearly learned as well. Of course, by the 1990s, the World Wide Web was increasingly available. Who remembers hyperlinks? I have had experience with both synchronous and asynchronous online educational activities. My latest experience was to try to design and implement a distance-education program for a professional master's degree using synchronous broadband teleconferencing with asynchronous mediated interactions with actual face-to-face classroom experiences. We designed a very good program for working professionals so they could study while continuing to work. But it got scotched because I did not read the institutional politics around flexible learning correctly, another profound insight of many of the swamp chapters.

Relations between technologies of distribution and adult education have a long history. Canada, England, and the United States have all developed many uses for whatever the currently available technology for access and distribution might be. Autodidacts in the seventeenth and eighteenth centuries depended on learned correspondence, subscription libraries, and coffee house newspapers. The nineteenth century saw the advent of correspondence schools and public libraries. Electronic communication began above all with the advent of the telephone in the twentieth century, which has led to the highly digitalitized world we now inhabit—the subject of the swamp chapters. So I would say adult educators have a long and involved history of using evolving technology to foster access for adults to education and learning.

I offer a few more comments by way of introduction. First, I'm sure readers will agree that these swamp chapters are fascinating accounts of real practice. Despite long-standing academic perceptions of educational practitioners as "non-thinking," these accounts are the work of fully reflective, analytical, and insightful professionals. The well-established

myth in academic disciplines like adult education is that practitioners need academics to do their thinking for them. Well, it simply ain't so.

Second, allow me to explain how I arrived at the observations I will make. Upon first reviewing the chapters, I read them with an eye to recurring themes, and I found many that had merit: collaboration and participation; student/learner interests; social dimensions of flexibility; the conflation of knowledge and information; the tendency to think of technology only in technical terms; the question of what e-learning is; the attempt to embed e-learning into traditional institutions; dependence upon Roger's diffusion of innovations as chief explanatory effort; a keen awareness of organizational context; an understanding of power, politics, and what John Forester (1989) has called the "people work" of institutional change; and finally, the question of flexibility itself. This is in no way exhaustive—another reviewer would clearly see other themes—but those I have listed reflect my orientation described above. Yet I lack space to elaborate upon them all, and furthermore, there is not equal presence of the various themes throughout the chapters. While they are all interesting to me, I am choosing to focus on the last three because of the predominance of their presence in the chapters and because I think the authors of the swamp chapters have the most significant insights about the themes of context, power, and flexibility.

## FLEXIBILITY

The editors asked the contributors to this volume to pull readers right into the heat of the action and its context before stepping back to reflect. I think readers will readily agree that all of the authors produced poignant accounts and keen reflections. The chapter authors were also directed to provide their "personal definition of flexibility." All did so, some quite extensively. So I turn first to highlighting the sometimes similar, sometimes differing notions of what these authors think flexibility means, as well as to noting two concerns expressed by chapter authors.

Andy Lane opens with and returns frequently to the question of just what flexibility is. He begins by asking whether open educational resources (OERs) will actually add flexibility "to how teachers can teach and how learners might learn." If educational resources are truly open, he asks,

"will they create significant change and greater flexibility in educational practices? By *flexible,* I mean that learners around the world are able to construct their own learning paths to suit their own learning styles, [and] teachers from all continents are able to draw upon high-quality resources and learn new strategies and tactics for teaching their chosen disciplines." Then Lane throws a dart right at the heart of what I think is really at stake in such provision. Will distance education, open access, computer-based learning, flexibility, or whatever the current term, actually provide educational entry in non-traditional ways or will it "just reinforce existing educational practices and divides, with the educationally and technologically privileged gaining more than those who suffer multiple deprivation and who currently have little or no access to higher education or appropriate technologies?" The phenomenon Lane marks is, to me, one spectre haunting the alleged democratizing of knowledge, education, and learning that digitizing supposedly promises. In the United States, where undergraduate tuition at elite colleges and universities can top US$50,000 *a year*, this likeliness of an undemocratic digital divide is referred to as "click" and "brick." Those who can afford to will continue to gain higher education face to face in actual "brick" institutions. Those unable to afford such access will be driven into lowered-tiered "click" institutions, where access is mediated digitally, thus furthering educational divides rather than democratizing access. Lane asks two very important questions: will flexibility really create access to new ways of knowing and learning, and/or will flexibility help to engender a new type of inequality?

Lane refers frequently to other more functional and technical aspects of flexibility such as "creating different spaces for different functions," "mixing and matching the free and open provision" of learning and knowledge with more traditional studies, enabling students "to communicate by whichever means they prefer," and making it "possible to do lots of different things." Other authors articulate similar descriptors and possibilities. Kay MacKeogh and Seamus Fox describe flexibility "in terms of location, duration, timing and pacing of study" and "developing information skills and literacies, widening access, increasing flexibility, increasing quality, and reducing cost and improving cost-effectiveness" in order "to reach students in different geographical locations and at different stages in their learning lives." Darien Rossiter describes flexibility as "information

literacy" and "multiple levels of subject granularity." Mark Northover and Andrew Higgins write about "transforming teaching toward a more flexible or blended approach," which they call "blended learning, that is, a blend of new digital technologies with older teaching strategies." Darcy Hardy notes that flexibility is "all about access . . . about a deliberate attempt to think about students' circumstances, about how, when, and why they learn. It's about truly taking educational opportunities to a level that implies that the institution is willing to do whatever it takes to make these opportunities available to students." Non Scantlebury and Gill Needham take a similar approach: "As librarians, our vision of flexible learning focuses on the opportunity to enrich, enhance, and diversify students' experience as truly independent learners through access to increasingly rich and sophisticated learning materials," which they call their "garden of learning delights." Later in their discussion, Scantlebury and Needham describe how important it was to develop "the skills learners needed not only to find and access the garden but also to toil within it, manage its resources, and propagate it further, extending its depth, breadth, and richness." As these comments show, flexible educators are a very committed lot, with access being one of the chief hallmarks of building and sustaining flexible systems. Despite their enthusiasm, however, as Lane points out, access is a problematic concept. We must continue to ask, access to what and for whom?

Clearly, though, flexibility has changed access. While it strikes me that creating gateways to otherwise previously unavailable knowledge and learning has been part and parcel of all of the previous technologies I mentioned earlier, the digital world is metamorphosing that access. I turn to one final observation about flexibility that I think is as profound as Lane's concern about flexible divides. Yoni Ryan has had more than a generation's worth of experience with the "new technologies." She starts with the observation that before it was called "flexibility," providers were "driven by our commitment to access and equity for those encountering difficulty attending classes because of family responsibilities, financial circumstances, or disability," a commitment well evidenced in the other accounts. From this starting point, Ryan constructs a more critical reflection on how flexibility has progressed and what its consequences may be turning out to be. She argues that "the term *flexible* now conveys 'convenience' with regard to access for the client/customer." Making the case

that initially flexibility was not about the technology, that "flexible learning was a pedagogical approach that was learner-centred and built on students' experiences," she notes that flexibility became "simply a technological fix to accommodate learners who were increasingly impatient with the rigidities of university processes." Ryan argues that education programmers have become too interested in solving technical problems—pouring funds into "digital projects that promised greater efficiencies in dealing with the massification of higher education"—and less interested in using technology pedagogically.

I find the enthusiasm of these authors inspiring. Their commitment to access and their awareness of the ever-varying vagaries of human learning is likewise inspiring. But I am left troubled by the questions raised by Lane and Ryan: is flexibility contributing to an ever more inequitable world, and is the technology itself (in its ever-evolving guises) supplanting pedagogy? I must say that in my own area of higher education, and with my earlier disclaimer still in play, I find these proclivities persistent and perhaps even pernicious. I find that the focus of discussion is less and less about who can learn what and how, and more and more about "flow" and distribution, as if all any of us ever really needs is information.

## CONTEXT: RELATIONS OF POWER AND THE "PEOPLE WORK" OF ORGANIZATIONS

Flexibility does not come free or without burdens, costs, challenges, and constraints. Everyone knows that. But actually understanding your context—that is, understanding your organizational setting well enough to create possibilities of/for flexibility—is another matter altogether. Knowing how to work with and within highly complex organizational contexts is absolutely essential for anyone who wishes to be successful in educational development. And providers of flexible access are no different. As much as we might want flexible access to be just about the provision of technology, providing access always also involves money and differing intentions about what must be done. The authors of the swamp chapters provide a plethora of insights about their organizational understanding and the political work of initiating, managing, and sustaining

flexible educational provision. First, let me take a look at some of the institutional contexts presented in the swamp chapters by way of framing a discussion of the authors' political insights.

All of the authors are keenly aware of their individual organizational settings. One thing that experience quickly teaches is that what works in one setting rarely transfers wholly to another. Each of the organizational contexts is unique, but Kay MacKeogh and Seamus Fox describe a broader environment in which many flexible programs operate. After setting up their chapter with the dire news that their funding had been eliminated—a message that no one wants to hear but is too often a reality in higher education these days—they describe the broader context of reform in European higher education. Describing their "often-difficult path to implementing flexible teaching and learning approaches in traditional universities," MacKeogh and Fox discuss the "wider context of the wholesale reform and modernization of higher education in Europe," which is "moving to a curriculum guided by learning outcomes as well as developing a transparent, flexible system that allows students to move between institutions and countries." Darien Rossiter focuses on what she calls the "supply-chain process." In this context, in the face of "increasing demand for greater flexibility in course delivery," academic staff "tend to adopt a minimalist approach, typically a course conversion model," which turns out to be online lecturing with PowerPoint slides. Rossiter describes how in this setting, "the sort of assistance these academic staff seek from support units is primarily administrative . . . with the expectation that the learning 'product' will be churned out at the other end, preferably with minimal impact on academic staff time," which in turn indicates "limited appreciation of the professional skills or production processes required to complete the work." I am sure there is not a flexible provider anywhere who is unfamiliar with these organizational conditions. Mark Northover and Andrew Higgins amplify the insight: one of the chief lessons they learned was that the university needed "to allocate clearly defined roles and responsibilities to staff, with enough *mana* (a Polynesian term for standing, respect or personal qualities that serve to inspire or lead others) in the system to ensure that decisions were acted on." Darcy Hardy shows how complicated such a directive can be: "Most people, administrators included, have no idea what it takes to develop and nurture a unit such as the UT TeleCampus."

This is where I shift to a more political telling of the swamp stories. Nearly every author clearly recognizes and attempts to address the politics of his or her particular setting. And nothing can be more political in higher education than funding. Kay MacKeogh and Seamus Fox begin their tale of "the rocky road to flexibility" with a recounting of a "disruptive event which threatened the future of our distance-education centre: our state funding was withdrawn. To say the least, this situation placed significant demands on the flexibility of the university to react in a way which protected the interests of staff and students, as well as its mission to widen access." Money and interested parties can often be counted on to conflict. As MacKeogh and Fox wryly observe, "institutions may pay lip service to the flexibility agenda while signally failing to adopt any initiatives that might actually achieve flexibility. As we have found, the pace of progress involved in changing a traditional university is slow: there are so many competing interests and traditions and so many levels of decision making."

Darcy Hardy continues the theme of power and politics with "stories about how administrators' perceptions can be more influential than reality on a flexible-learning project, how massaging egos can bring about buy-in for a new movement, and how alarming it can be to find out how little many people care about the nuts and bolts of collaboration." She also calls attention to "the part that economics and politics play" in developing flexible-learning systems. Mark Northover and Andrew Higgins put it this way: "The strategic success of any substantial innovation will be determined by the politics of the process rather than by the inherent value of the innovation itself." This is what I am getting at with the "people work" (Forester 1989) phrase in the heading of this section. Hardy describes the people work of program development this way: "For me, the key was to find the most skeptical but influential people on each campus and build relationships with them. It's really all about relationships. Once established, they open the door for honest and respectful discussions. They build trust. . . . Building those relationships has had a major influence on the success of the TeleCampus." Gaining "access to people with power" was a major determinant of her success. She uses an image that I find especially resonant, encapsulated in the phrase "working the planning table" (Cervero and Wilson 2006): "I think one of the biggest mistakes that people in senior leadership roles like mine make is to not bring the right people to

the table at the right time." As Hardy says, "it was the people at the table themselves—yes, the very people who pushed back at the beginning—who came up with the solution. This is how you make changes that stick." She is really arguing for a collaborative approach to organizational development, but she does so with a keen sense of organizational power and politics.

Such table working is not limited to major institutional decision makers, whether resistant or supportive. Darien Rossiter offers a related but different aspect of power relations among students, flexible staff, academics, and sponsoring units. She describes how in flexible settings, there is a shift in the "locus of control from teacher/instructor to student/learner,"which is typically resisted by those more empowered by "instructor-led, learner-dependent" cultures. Scantlebury and Needham, in their extended metaphor of the garden, offer a similar observation: many academics "were not at all sure that they wanted their students to enter that garden." Northover and Higgins describe how the "actions and expectations around new teaching models alienated some staff, particularly those who saw themselves as guardians of the old ways." Rossiter warns of the risk that "a negative tension will take hold among the various stakeholders, undermining the quality of educational courses and the relationships of those who develop and deliver them."

Above all, it is the astute political insights of these authors that I find most compelling. As I have argued elsewhere (Cervero and Wilson 2006), educational development work is never simply technical. It is never just a matter of following an invariable set of procedures to a foregone conclusion. Rather, development always involves people, and people always bring their own and selected segments of their institution's interests to the planning table, acting with varying degrees of power to achieve their interests. Nowhere is that better embodied than in these chapters.

## BEYOND THE TECHNOLOGY

Here are a few last thoughts to consider about these compelling accounts of real practice. We now know that technology—all the different systems of delivery and access described here and elsewhere—can be, and indeed needs to be, thought of in terms of its "toolness." I don't mean *tool* in the

conventional terms largely used in these discussions, that is, the ability of Tool A to accomplish Task B, in the way a particular type of wrench is used to unlock or lock A. bolt, or how a particular database is appropriate to a particular purpose, or how a public library in the nineteenth century was a tool for accessing knowledge. Far too often, technology capable of widening access is thought of in such instrumental ways, as it seems to be generally presented in the swamp chapters. I want to suggest that we see these multiple, mediated mechanisms of interaction as fundamentally shaping human cognition and interaction, as well as being shaped by them. There are intimations throughout the chapters about this socio-cultural phenomenon, but the discussion rarely goes beyond references to Web 2.0 and social learning sites. Just as a book shapes the way we think and how we think shapes the formation of the book, so too such reciprocal shaping occurs in the digital age. Anyone of my age with children in their twenties or thirties knows that people who grew up in the digital age—psychologically, socially, culturally, politically, economically, literarily—think and act differently than those of us who came of age when the printed page reigned supreme. This is no small matter. There are lots of technical academic terms to describe this phenomenon, which I won't belabour here. But if I have a disappointment in the chapters, it is that while many of the authors are on the cusp of grasping this profound change, they do not yet seem to understand it well enough to really take advantage of it. Although some have fought hard to institutionalize new access and communication technologies, if we do not grasp how fundamentally human cognition and interaction are changing, we will fall short of meeting the goal of enhanced access and ever more genuine flexibility.

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## ABOUT THE AUTHOR

Arthur L. Wilson remembers watching instructors on television in the early 1970s teaching the subjects necessary to pass the US General Education Development (GED) test to earn an equivalent high school diploma. Little did he know then that he was soon to become an adult basic education (ABE) and GED teacher himself, although the television part did not come until years later. Before he became an ABE/GED teacher, his first job in adult education was driving the van transporting students who had no transportation to and from the ABE/GED adult-learning centre. His practice since then has included literacy education, staff development, continuing professional education, and adult education in higher education. He is currently a professor of adult education and chair of the Department of Education at Cornell University. Some days he wishes he were still driving the van. vivo.cornell.edu/individual/vivo/individual8750

# 16 › Mapping the Driving and Restraining Forces on Flexibility in Higher Education

CHÈRE CAMPBELL GIBSON AND TERRY GIBSON

We begin with an observation made by Kay MacKeogh and Seamus Fox that truly describes us both:

> As practitioners committed to the concept of flexible access to lifelong learning and with long experience of the impact such learning has on the lives of our students, we sometimes feel like those travellers of old who have returned from far-flung shores with tales of wondrous things over "there" that those who have stayed "here" refuse to believe.

But we refuse to be discouraged. We need to better understand where "here" is in our institutions. In the eleven preceding chapters, the authors have documented those forces that enhance efforts toward flexibility and those that stand in the way. We will use our own personal perspective on flexibility as a lens through which we view Kurt Lewin's (1997) Force Field Analysis and the writings of our authors to map the socio-cultural and economic forces, institutional forces, and individual forces highlighted in the preceding chapters. Throughout the short summaries of these driving and restraining forces, we will briefly allude to how these forces change over time and influence each other, adding our personal thoughts and experiences on how to enhance our progress toward increasing flexibility in higher education. We'll close with our perspective on what criteria we would use if asked to assess flexibility in an institution of higher education, criteria that you in turn might use to assess the flexibility in your institution.

## DEFINING FLEXIBILITY IN HIGHER EDUCATION

Flexibility in the extreme could be described as anyone, any way, any time, anywhere, any flavour, any price, with no prerequisites, assignments, deadlines, or grades. In an ideal world, one could argue that more flexibility is better than less flexibility. However, in the real world, the challenge is to provide flexibility without too much complexity and chaos for students, faculty, and institutions.

How does one begin to define *flexibility*? We believe it must start with an understanding of the forces identified in the preceding chapters and with the culture of the institution, its faculty, and its students viewed in the context of larger societal influences. Any definition of *flexibility* should, we believe, be operational and situational. The biggest challenge is to define *flexibility* in the context of your own institution and specific set of circumstances and then use that definition to frame policies, procedures, and costing models that can be widely communicated, whether these pertain to students, faculty, or the institution itself. Arriving at the situational definition of *flexibility* should be a collaborative process, one that involves students, faculty, administrators, and funding agencies. A situational definition will help to ground the institution in reality, keep it from promising more than it can deliver, and help it to avoid marketplace seduction. This does not mean that situational definitions should be engraved in marble. They should continue to evolve and change as new technologies emerge, faculty attitudes change, and competitive forces bring new realities. There should always be room to stretch the vision.

Without a situational definition of *flexibility* grounded in the reality of a context, the concept remains ethereal and elusive. If *flexibility* is not clearly defined, then each faculty member, support staff, administrator, and student may operate from a different perspective and set of assumptions.

## SOCIO-CULTURAL AND ECONOMIC FORCES

The key socio-cultural and economic forces enhancing and detracting from flexibility in higher education described by our authors are illustrated below. The relative strength of each of the forces varies among and between

the contexts; thus, the challenge for you is to reflect on your personal context, to add or subtract forces as applicable, and to assign relative strengths.

| FORCES DRIVING FLEXIBILITY | FORCES RESTRAINING FLEXIBILITY |
|---|---|
| SOCIO-CULTURAL AND ECONOMIC FORCES | |
| National priorities → | ← Increased levels of complexity |
| Government educational policies → | ← Unfunded priorities or mandates |
| Government funding initiatives → | ← Research advantaged over teaching |
| Labour-market demands → | ← High unemployment |
| Strong economic conditions → | ← Competing demands/rewards/etc. |
| Vast digital infrastructure → | ← Weak economic conditions |
| Employer/student demands → | ← Limited digital infrastructure |

*Socio-cultural and Economic Forces Driving Flexibility*

National priorities often push toward flexibility in higher education. These priorities may include engaging in social transformation, redressing past inequities of access to quality education, enhancing access to education, and ensuring the achievement of goals, often with the intent to drive the national economy and address labour-market demands. Related government priorities, policies, and funding initiatives ideally follow. Strong economic conditions provide the necessary capital to make these priorities a reality, with a vast digital infrastructure being yet another force to drive flexibility in higher education. When you have the money and the means, why not use it?

*Socio-cultural and Economic Forces Restraining Flexibility*

But there are also forces that restrain the push toward enhanced flexibility. The preceding chapters document the increased levels of complexity that new policies and related procedures bring. Unfunded priorities and unrevised mandates serve to maintain the status quo, as do national funding mechanisms and policies that advantage research over the kind of teaching that might extend the reach of higher education. High unemployment often leads to high demand for further education to retrain or re-career: it is a driving force, certainly, but it brings with it low government revenues, which impact negatively upon education, especially because initiatives are seen as increasing the demand for limited funds, including demands to enhance a limited digital infrastructure.

Finally, Latchem and Jung remind us that, regardless of resource levels, "some cultures also seem more ready to adapt and change than others." As they point out, South Korea has been "exceedingly proactive in encouraging and supporting new cyber universities, university consortia, and e-learning, and, as a consequence, 'virtual learning' is entering the mass adoption stage." In Japan, however, education reform and the "e-transformation" have been slow to arrive "because the openness, flexibility, and bottom-up approaches needed for these are incompatible both with the bureaucratic regulatory approaches of the Japanese government and with the hierarchical tendencies and opaqueness of the universities."

*Our Own Reflections: Socio-cultural and Economic Factors*

Although not for want of trying, it has not proved easy to influence educational policy at the level of government. Here are some potentially useful tactics to consider:

- Have a champion in high places. It is a distinct advantage, as more than one of our authors has noted.
- In the absence of a champion, lobby legislators discretely by, for example, inviting them to tenth anniversary celebrations of pioneering degrees earned at a distance. If possible, hold these events in government buildings, with legislators' constituents as prominent graduates and guests.
- Share research and personal success stories about how flexible higher education has changed lives, enhanced businesses, and impacted local economies through expanded access to education. Such information is critical to broadening the base of understanding and, hopefully, support, especially if that information is shared with those on powerful education committees that direct funding initiatives.
- The fact that taxpayers who foot the bill for state education should have access to its benefits is worth mentioning—a lot!
- Help legislators to see that because their support for the funding of flexible higher education directly and positively impacts their constituents, it could contribute to their re-election and is therefore worth the time and effort. Usually all this is not enough, but in rare cases it yields results—in our case, US$10 million in funding to

support a government initiative specifically for the development of additional baccalaureate degrees at a distance that would be accessible to all the citizens of the state of Wisconsin. Sadly, a hoped-for re-election to public office did not occur: the degrees, however, remain to this day!

## INSTITUTIONAL FORCES

Institutional forces, both driving and restraining, loom large as our authors try to negotiate for more flexibility in higher education. The driving forces emerging from our analysis and our experience are very obvious and compelling, but restraining forces seem almost overwhelming in their pervasiveness. Many of these restraining forces, however, have existed for a very long time and are showing signs of weakening. An innovative educator can negotiate change through the cracks that are appearing—like a drop of water turning to ice and widening the crack. And you do need ice in your veins to negotiate the institutional barriers to progress.

| FORCES DRIVING FLEXIBILITY | FORCES RESTRAINING FLEXIBILITY |
|---|---|
| INSTITUTIONAL FORCES | |
| Vision → | ← Public failures |
| Available funding → | ← Systemic rigidities |
| Anticipated economies of scale → | ← Lack of shared vision |
| Institutional suppleness → | ← Reluctance to reallocate funding |
| Faculty desire/experience/support → | ← Competing demands/rewards/etc. |
| Ubiquitous technology resources → | ← Fragmentation of efforts |
| Belief in technology solutions → | ← Lack of institutional support |
| Employer/student demands → | ← Shift to part-time workforce |

### *Institutional Forces Driving Flexibility*

A host of external and internal forces drive institutions toward flexible higher education. These include the socio-cultural and economic forces originating from government policies and funds as well as labour demands and digital infrastructures. But it all seems to start with a vision of institutional flexibility. Various rationales abound, from enhancing institutional

reputation to widening access to an often-unspoken intention of long-term institutional viability. Anticipated economies of scale—the ability to serve more students with less money, with the hope of generating excess revenue—has driven many an institution; some have been driven even to failure. Availability of funding is critical to support both course and faculty development and learner and technology support, but a degree of institutional suppleness is also required to drive operational changes toward flexibility.

A number of authors alluded to the importance of the desire of faculty and staff for a more flexible institution. Our authors suggest that with faculty experience and a willingness to develop and support others, we can move ever closer to our flexibility goal. Arrays of technology resources both within and outside the institution, including, for example, open-source online learning systems, can serve as drivers, but beware of a related driver—the belief in technological solutions. A systems perspective on flexibility is critical, and technology is but one component in a larger system of interacting parts.

The last institutional driver is learners who have needs and expectations, and may represent a more diverse population than some institutions are currently serving. More than one author asks, "Are we supple enough to meet these needs?"

*Institutional Forces Restraining Flexibility*

As you read the chapters in parts 2 and 3, we're sure it came as no surprise that many of the restraining forces are repeated often in the narratives.

Some institutions fail to move in the direction of increased flexibility. Perhaps the very public failures of some are enough to discourage the faint of heart. Other authors suggest that the absence of growing institutional flexibility is the result of systemic rigidities in a culture that is resilient and ever-changing, and growing more so over time. Other institutions do move forward, but often with a vision imposed from the top, only partially relevant, obscure, poorly communicated, or all of the above. Couple these deficits with a reluctance to allocate funds to implement the vision—however clear, unclear, or contentious—and innovative changes in practice will not be forthcoming.

Additionally, ongoing fragmentation of efforts due to a lack of clear vision, competing demands within the institution, and a lack of incentives

or rewards (including merit pay, tenure, or promotion tied to flexibility initiatives) serve as strong restraining forces. The lack of institutional support for developing and teaching courses, the withholding of technology support for faculty, and issues surrounding course ownership and the potential use of course materials by others further restrain movement toward flexibility. Another emerging issue is a new model of instruction with more part-time instructors, especially in hard economic times. This model is more readily implemented with teaching and learning at a distance. Finally, as Darien Rossiter notes, "there is a degree of skepticism or wariness about an education and training environment that shifts the locus of control from teacher/instructor to student/learner."

*Our Own Reflections: Institutional Forces*

From our experience at the 42,000-student, research-oriented University of Wisconsin–Madison (www.wisc.edu), extensive technology resources and employer/student demand for greater flexibility are not sufficient to make great strides in providing that flexibility. We soon discovered that just one flexible degree program could make a difference. The vision of one faculty member, a sound needs/market analysis that highlighted the needs of employers and students alike, existing competition, and a group of supportive faculty members, combined with a comprehensive business plan, enabled the College of Engineering to borrow money from central administration to develop a completely new online master's program, complete with a new problem-based learner-centred pedagogical approach to learning, a new curriculum and courses, new delivery mechanisms, and so on. Instructional designers worked one on one with faculty to design the courses using appropriate technology selected on the basis of learning objectives and to teach the faculty members how to use the technology to teach online, all based on sound research from distance-learning experts on campus and around the world. Strong technical and student support was mounted, including the students' first course entitled "Network Skills for Remote Learners," a course designed to ensure learner success (mepp.engr.wisc.edu/Why_MEPP/Courses/NSRL.lasso). An evaluator rounded out the elements of this substantial and subversive push toward greater flexibility.

Using a creative band of faculty members, including ourselves, the faculty and staff had, in the face of scarce institutional support, met seven

challenging goals. They created a shared vision for flexibility in higher education for a small portion of the institution, they found loan funding in the face of reluctance to reallocate dollars to their efforts, and they defied systemic rigidities. They provided support for faculty and students within the emerging academic program that was not dependent on the larger institution, met employer and student demand for an appropriate education, and provided pre-agreed-upon rewards and incentives for the newly trained group of faculty members. Finally, by building on research and expertise across and beyond the institution, that creative band of faculty members built a program that had the potential to be a public success, not a public failure. Five national and international awards later, that seventh goal, public success, was certainly achieved.

Many lessons have been learned and put into place at the University of Wisconsin–Madison:

- Have a vision you can convey to others.
- Do your homework. Assess employer and learner demands, know your competition, and understand your unique academic niche. This is vital if you are seeking funding internally or externally through grants.
- Develop a sound business plan to sell the program internally or externally before, not after, you launch it. The plan should, for example, direct some profits to the unit for program enhancements, provide a foundation for additional degree development, and enable faculty to pursue professional development.
- Avoid duplication—co-operate when you can. For example, in implementing the "Network Skills for Remote Learners" course, some faculty, as well as support and technical staff, have been shared across degrees.
- Hire an evaluation expert with excellent academic credentials and distance-education experience and research to carefully assess the impact on students, their families, the faculty, students' employers (subordinates and supervisors), and even the institutions that employed the program graduates. These results can be used to enhance the program and to increase understanding of the impact of making degrees convenient and accessible to diverse students.
- Share your evaluation results liberally in faculty colloquia, through individual consultations, and in demonstrations across the

institution and with administration, whether they ask for them or not. To date, several other online degree programs at the graduate level have emerged since that first one! Slow but sure progress has occurred—from the bottom up, in this case.

- Be prepared to defend everything, from technology choices to learner support. There will be pressure to use whatever is available at your institution. If an idea or strategy fits your curriculum, your pedagogy, your learners, your faculty, use it. If not, have your research in hand to defend your position.
- Never underestimate the power of the learners' or employers' voices. From our experience, even an individual course can develop a cadre of disciples willing to go forth and tell the world about the benefits of experiencing teaching and learning via flexible education. If you need them, call on them.

And, finally, enjoy the ride! You're an agent of institutional change!

## INDIVIDUAL FORCES

We focus here on the teacher and the learner as individuals. Both exert pressure on flexibility in higher education, as we shall see.

| FORCES DRIVING FLEXIBILITY | | FORCES RESTRAINING FLEXIBILITY |
|---|---|---|
| INDIVIDUAL FORCES | | |
| Learners' demand for access, equity, and convenience | → | ← Learners with little time/high expectations |
| High learner motivation | → | ← Learners who prefer face-to-face instruction |
| Learners who prefer student-centred teaching | → | ← Learners who prefer teacher-centred teaching |
| Faculty committed to equity and access | → | ← Faculty who fear change |
| Faculty who are motivated | → | ← Faculty who are skeptical or negative |
| Faculty who have expertise in flexible teaching and learning | → | ← Faculty who fear impact of low funding on quality |
| | | ← Faculty who worry over job security |
| Faculty who see flexible learning as a pedagogical approach | → | ← Faculty who view flexible learning as a technological intervention |

*Individual Forces Driving Flexibility*

Increasingly, a diverse array of learners is pushing for equity of access to higher education. These same learners are also beginning to demand flexibility. With the high cost of education and the current economic climate, the ability to take classes anytime, anywhere is critical for those who need to work to pay the rising costs of tuition, and this includes our traditional undergraduate student. Adult students, already working but highly motivated to make their educational dreams a reality, also push for equity of access to education regardless of circumstance. Highly motivated and possessing clear learning goals, these adults also desire more flexibility in pedagogical approaches that move from a more teacher-centred to a more learner-centred approach.

But learners are not the only ones pressing for flexibility. Faculty have become a force for equity of access and are motivated to explore means to address the challenges to flexibility in teaching and learning that they face in their institutional context. A grassroots force for flexibility in higher education is emerging, as Cathy Gunn notes. Combine this group of motivated faculty with others who have the expertise and experience needed to enhance flexibility in teaching and learning, and we are truly pressing for change. But as Darien Rossiter suggests, "How we change, how we think about flexible learning and what 'student-centred' means in new electronic environments and within our dual-culture context, will influence how successfully we are able to embed the best of flexible and e-learning into our learning and teaching philosophy and practice."

*Individual Forces Restraining Flexibility*

But once again, individual forces restrain progress toward increased flexibility. Learners at a distance are often multi-tasking—balancing work, family, and leisure—and thus are time-poor, but have high expectations, nonetheless. Face-to-face instruction with a teacher-centred pedagogy is decidedly advantageous for students who just want the teacher to tell them what is needed and how to get there. Expeditious studies are key in such circumstances. While perhaps not a direct force restraining flexibility, these learner characteristics have a decided influence on the attitudes and beliefs of some faculty, as we shall see.

Fear of change is an attribute shared by many of our colleagues in higher education (as many of the authors of this book point out). Add to that issue a perception that students have limited time and energy to devote to their studies, insufficient competence and confidence to study the content at a distance with technology, and a commitment to goals more credential-oriented than learning-oriented, and skepticism emerges. Several authors note that access to technology, the capability of the technology being used, and individual competence with technology not only continue to differentiate students but also serve as a barrier to flexibility in higher education offered through digital technologies. Sadly, some of the fear emerges from similar shortcomings in faculty members themselves. Andy Lane asks, "So are we asking the wrong question? Is openness really part of flexibility, and is flexibility only suitable for the sophisticated learner and/or teacher because it requires confidence and competence? Do most people still like the comfort and safety provided by existing, less flexible, educational provision because someone else does the scaffolding work to make sense of an often complex and messy business such as education?"

Certain learner characteristics and competence levels cause ongoing frustration for faculty and, according to their accounts, restrict their ability to teach at their traditional levels of quality. Furthermore, they feel concern about the impact on quality of lack of funding for flexible education. Hidden beneath all these issues lies a fear of losing not only their intellectual property but also their jobs in an era of increasingly casualized academic employment.

And finally, as Yoni Ryan laments, if only flexible learning had been understood as "a pedagogical approach that was learner-centred and built on students' experiences, and not simply a technological fix to accommodate learners who were increasingly impatient with the rigidities of university processes and 'delivery by lecture,' flexibility might have been achieved within the decade." Such is the value of hindsight but also the value of learning from the experience of others!

*Our Own Reflections: Individual Forces*

So what does our experience tell us? We concur with what Mary Simpson and Bill Anderson have articulated:

> First, we must be mindful of the value and role of research in innovative practice. Innovations that aim to break the traditional transmission model moulds must be rooted in a solid understanding of past research; they must be evaluated rigorously and systematically, and the results disseminated. Second, teamwork is all. It gives us a fighting chance to anticipate and creatively overcome the obstacles to progress. . . . The third lesson is that our progress toward consistently flexible higher education is slow and challenging.

Our lessons here are quite practical:

- Research your practice. If you need research to achieve tenure, salary increases, recognition, and so on, conduct quality research on your teaching and publish it. Also, find lots of opportunities to share it among the faculty and administration.
- Have a strong grasp of current quality research on technology-based teaching in your area of expertise and that of others in your department, if possible.
- Share it liberally!
- This grasp of current research and even historic research will come in handy when you volunteer to serve on institution-wide committees exploring teaching and learning with new technologies. Yes, you must volunteer, or those skeptics will share their misunderstandings to such an extent that they will become codified.
- Team teach. While it may be an additional burden to team teach a course using technology to learners at a distance, the time is well spent when you consider that yet another course is now accessible to learners and another colleague is less fearful of change, has some modicum of expertise, sees flexible learning as something other than a technological solution, and, hopefully, has seen new models of teaching and learning in action, models that lead to quality learning outcomes. You will also have another team member to help you make progress on adding flexibility to a curriculum.
- Team up on research and/or evaluation projects related to flexible higher education or to projects moving forward with innovative solutions to add flexibility, even if they are in a different academic

unit. The time we have both spent working with our colleagues in engineering and nursing—sharing hopes, dreams, research, and lessons learned, designing learner support writ large, teaching "network skills," and so on—has been invaluable. It has been a win-win situation. We get to talk about something we know and love, learn what they have discovered, and share good times with colleagues who share our vision. Not many share our vision of flexibility in higher education, so we need to find them, wherever they are hiding, to help us all become a force to be reckoned with.

- Another force to be reckoned with is students. Ensure their success. Students who have found success in a flexible program in higher education, a program that they could not have accessed otherwise, are walking marketing tools and a force for change.

Sadly, you can do little to speed up the progress of flexibility in higher education other than nibble away at the edges of the forces that slow down progress. And we repeat—participate on those committees exploring flexible alternatives although it may be the fifth such committee you've served on. Eventually, you'll wear them down!

## ASSESSING FLEXIBILITY IN HIGHER EDUCATION

So where do we need to direct our efforts to enhance flexibility in higher education? We have highlighted a number of forces that drive and restrain efforts to achieve more flexibility in higher education. The strengths of each are highly variable because they are based on the specific context in which they occur. And we recognize that as we exert pressure on one force or eliminate another, other forces may emerge. Such is the adventure of change in higher education.

We have observed distance education and higher education in the international arena for a combined total of over sixty years; we have served on national and international boards, review panels, and accrediting bodies; and we have interacted with thousands of practitioners and scholars from around the world at the Wisconsin Distance Education Conference over the past twenty-five years. Based on those experiences,

we conclude by sharing our criteria for the evaluation of flexibility in an institution of higher education. Here are a few questions we might ask if we came to your institution to assess its flexibility:

1. Have the mandates imposed by legislative and accrediting bodies been reviewed?
2. Does the institution use a collaborative planning process that involves students, faculty, staff, administration, and funding agencies?
3. Has a written institutional situation analysis of socio-cultural, economic, institutional, and individual forces been prepared?
4. Does the institution have an operational/situational definition of flexibility?
5. How does the mission statement address flexibility?
6. Do policies, procedures, and business models support flexibility?
7. Is capacity building provided in the following three areas to support the mission statement and the operational definition of flexibility?
    a. Faculty and staff development
    b. Learner education and support
    c. Technology support and staff development
8. Are curricula and teaching and learning strategies sufficiently supple to provide flexibility for the diverse learner population?
9. Is assessment and evaluation ongoing for continuous quality improvement?
10. Are accountability measures, rewards, and incentives in line with strategic initiatives?

## CLOSING THOUGHT

When all else fails, remember Cathy Gunn's observation:

> The same flexibility that is demanded for learning environments slowly filters through to organizational structures and systems that support such flexibility. Concepts of power and leadership are gradually shifting from individual to collaborative models. Such a culture shift is significant for future developments. Even though people and organizations

generally resist it, over time change is inevitable and finds its own equilibrium. One impact of new technology and the social change associated with it is a shifting locus of control in various parts of formal education systems. Regardless of politics, evolving pedagogy will persist as a significant driver.

Hope springs eternal.

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## ABOUT THE AUTHORS

Seldom does an "F" inspire a career, but such was the case for Chère Campbell Gibson. A serendipitous opportunity to design distance degrees in the late 1970s brought back memories of the distance-education course she once failed. A lifelong advocate for learner support was born! For over twenty-five years, as a faculty member at the University of Wisconsin–Madison, she focused her research, teaching, and outreach on distance education. She has helped to launch numerous undergraduate and graduate degrees at a distance as well as non-credit programs for professional development in distance education for both pre- and post-retirement learners. Committed to equity of access to education, she never ceases to regale administrators and faculty colleagues alike with the benefits of flexibility in higher education. http://webpages.charter.net/gibsoncommunications/Gibson%20Communications.htm

During his college years, Terry Gibson worked with instructional television and realized that there was more to distance education than just putting a classroom on television. In his graduate education, he sought to better understand the design of instruction for distance education in undergraduate, graduate, and continuing education contexts.

Throughout his career in the United States in higher education, he has worked as an instructional designer, teacher, administrator, and scholar to improve the quality of distance education. He is the founder of the Wisconsin Distance Education Conference, which is now in its twenty-sixth year and each year brings together more than a thousand distance-education practitioners, scholars, and administrators from around the world. He is currently Professor Emeritus in the School of Human Ecology at the University of Wisconsin–Madison. http://webpages.charter.net/gibsoncommunications/Gibson%20Communications.htm

# FOUR

## › ADMITTING COMPROMISES

# Introduction

How the political and societal landscapes in Australia changed during the twentieth century, and again in the early twenty-first century! They directly influenced the rise and decline of the type of distance education that was based, overtly, on the values of access and equity. Terry Evans and Peter Smith review the educational compromises underneath the New Right political agendas and the increasing commercialization of post-secondary education provision. Distance education was transformed, they write, "from a public good, serving those who were geographically or socially distanced from education, to a (quasi-)private enterprise geared to the engines of industry and commerce. This reconfiguration required turning public educational services into private or public educational enterprises and moving from supplier-driven services to consumer-driven products." Add to this the confusions of changing terminology and you have to ask, how is all this unrest and fashionable discourse really helping adult learners?

Greville Rumble has very extensive experience in financial analyses of various forms of distance education. He begins his chapter unequivocally: "Flexible learning affects the cost of individual courses and may also seriously disrupt the cost structure of an institution, such that resources will need to be deployed in different ways." From there, he lays out the cost-related factors that challenge institutional efforts toward labour-cost efficiencies and effective learning and teaching. The rise of online learning methods does not necessarily lead to reduced costs—indeed it may well increase them—so Greville points to the need for more attention, in cost terms, to Web 2.0 technologies as a way to "change the economics of online learning." But the story does not end there. How do formalized institutional quality-assurance procedures fit with the informal collaborative activity that is buried inside individual online courses?

Melody Thompson and Laura Kearns use the image of "mastery" to frame their discussion of the ethical issues involved in making choices about who is served best by flexible-learning approaches and who,

ultimately, gains the most. “How do we decide,” they ask, “when deliberative compromise is appropriate and when, regardless of personal costs, we should stand firm and refuse to compromise?” They give no definitive answers but instead offer strategies (such as “clarify contextual ambiguities”) that we can use to interrogate workplace activities and develop appropriate ethical responses. Melody and Laura then examine six typical teaching practices and their ethical implications. However we choose to define ethical mastery, it certainly must be better than exerting power and control, however benign, over others.

# 17 › The Fog of Flexibility
## *The Riskiness of Flexible Post-secondary Education in Australia*

TERRY EVANS AND PETER SMITH

In this chapter, we consider the political, social, and technological features contributing to the rise of distance education in twentieth-century Australia and to its dissolution in the early twenty-first century. Our discussion considers international trends and influences, and particularly the Australian experiences that created the foggy mélange: external studies, extension studies, off-campus studies, open campus, open learning, flexible learning, flexible delivery, distance learning, distance education, correspondence learning, online learning, e-learning, and so on. The fogginess of the terminology reflects the "buzzword" politics of the turn-of-the-century governments, their bureaucracies and bureaucratese, and of the commercial world, its marketers and advertising slogans (Watson 2003).

### A TIME OF COMMON CONCEPTS AND PRACTICES

In Australia, distance education began, as Bolton (1986) describes, to provide education to rural and remote communities across a large but sparsely populated land. Correspondence studies in higher education commenced at the Universities of Queensland (1910) and Western Australia (1911). For a brief period after World War II, all Australian universities enrolled external students to assist with the postwar reconstruction: for example, the largest, the Universities of Melbourne and Sydney, enrolled 872 and 1,072 external students, respectively. Much of this provision was for schoolteachers as part of their on-the-job training or professional development (Evans and Nation 1993). Australian school-level correspondence

education began in Victoria in the early part of the twentieth century. In 1951, distance schooling introduced the first electronically mediated distance education in Australia through the Alice Springs School of the Air. Using the radio network of the Royal Flying Doctor Service, this and subsequent Schools of the Air supported children studying through correspondence schools, although public radio broadcasting to schools had begun decades earlier, in the 1920s.

At the post-secondary education level, the 1960s and 1970s saw the development of a network of colleges of advanced education (CAEs) that provided higher education to bachelor-degree level in the capital and major regional cities. About a dozen regional CAEs emerged, most of which sustained their viability partly through distance-education enrolments. The CAEs offered vocational degrees but were distinguished from the universities by having no postgraduate courses beyond postgraduate diplomas, nor any commitment to research. By the late 1970s, each of the Australian states (apart from Tasmania) also had at least one university that offered distance education. By the 1990s, the CAEs and universities merged into a higher-education system consisting of universities and a few small specialist colleges. Each state and territory provided distance education through at least one university, although, as we argue below, the rise of online education ensured that distance education now forms part of every university's practices and every student's life. The other major component of post-secondary provision in Australia is vocational education and training (VET), provided through Technical and Further Education (TAFE) institutes. By the 1950s, each Australian state had a centralized distance-education provider of VET.

Initially, most Australian distance education was called *correspondence education*. Later the term *external studies* or *extension studies* (especially in agriculture) become popular in post-secondary education. This signified that the college or university was offering (extending) its courses (externally) beyond its classrooms. Australian post-secondary distance education was and remains dual mode in the sense that no distance-education provider operates, as the Open University of the UK does, independently of a traditional university. Correspondence education was an accurate description for practices that were substantially based on written pedagogical exchanges. (Typically, some face-to-face meetings,

summer schools, and so on were also provided.) Eventually, *external studies* became the preferred descriptor, as the use of face-to-face provision, including study centres in regional cities, made it clear that more than correspondence was required. This became even more apparent as communications media such as teletutorials, radio, and television were used more frequently (Bewley 2008; Smith 1984).

Until the 1970s, the terminology of distance education, especially the terms *correspondence education* and *external studies*, had a conceptual and practical utility, although that is oversimplifying the situation. In most cases, courses taught by a college or university on campus were simply replicated in a written and printed form, and posted to external students. Students sent back completed assignments for assessment and comments, and grades were returned to the students. Usually other forms of support were available for students, and gradually other media were used, too. From the perspective of the early twenty-first century, it looks clear and simple!

## THE INCOMING FOG: DISSOLVING THE COMMON CONCEPTS

The early history of distance education in Australia was strongly shaped by governments' concerns to provide education for children (especially since they were legally required to "attend" school) and for adults. By the 1970s, there was a rising political debate and concern about achieving educational equality for those who were disadvantaged by being poor, female, and/or disabled. The election of a Labor government in 1972, after years of Conservative rule, energized distance education, especially at the post-secondary level. Women—who were expected, as girls, to leave school at age fifteen to work and then marry—enrolled to complete their secondary schooling or went directly into universities that had an open undergraduate entry policy. Distance education was about access and equity; it was about reducing the educational and social inequalities in the population. This was the period when some universities and colleges changed to the terms *off-campus* or *open campus* to refer to study that did not fundamentally require regular on-campus attendance at lectures

and/or that was open in terms of entry requirements and accessibility. In summary, the period between the end of World War II and the early 1980s was characterized by a fairly common conception of distance education and a fairly common set of practices. Additionally, statistics showed that distance-education students were no longer always geographically distant from their institution (Smith 1987); rather, growth had been driven by the participation of metropolitan-based enrollees who were "distant" because of time, work commitments, or transportation difficulties.

By the 1990s, after about twenty years of "access and equity" policies (especially in the elementary and secondary school sector), distance education had helped to change the gendered social and educational landscape. More girls were staying in school and pursuing post-secondary educational opportunities immediately thereafter. The need for distance education to cater to women who previously had not had post-secondary educational opportunities was declining, although, for a minority, the problem of distance from educational institutions remained. Undergraduate distance education was more often attracting the mature working and/or parenting metropolitan student than the rural or remote-area student with limited access to university education. This period was also the time when postgraduate distance education grew significantly, especially for teachers undertaking MEd degrees but also for students in fields such as business (MBAs, etc.). These were not "disadvantaged" students who had "missed out" on university education; these were graduate mid-career professionals looking to improve their careers. Although a few dual-mode Australian universities had offered PhDs "off campus" since the late 1970s, by the late 1990s, most (if not all) Australian universities were offering—formally or informally—off-campus, part-time PhD studies (Evans 2008).

This period was influenced by the emerging New Right agendas that took grip under Reagan in the US and Thatcher in the UK, but that strongly shaped political ideology in Australia, from the Hawke and Keating governments of the 1980s, to the mid-1990s under the enthusiastic New Right Howard governments. The 2008 Nobel Laureate in economics, Paul Krugman, describes the deep and profound effects of the New Right on the United States (Krugman 2009). Although the effects on Australia were less profound, they reshaped the way distance education was perceived

and funded in the university and VET sectors (elementary and secondary schooling was less markedly affected). In particular, the access and equity ideology of the 1970s was now replaced with an "economic rationalist," user-pay ideology. Education began to be seen not as a public good but as a private good, one for which the "consumers" should pay since they would benefit through their greater economic worth. Distance education adopted the language of flexibility from this ideology, and this adoption fogged the educational discourse with terms such as *flexible learning* and *flexible delivery*. Fees and loans were introduced, especially at the postgraduate level, and services that were previously seen as justified on an access-and-equity basis now had to be justified on a cost-benefit basis. The language of commerce and bureaucracy began to replace that of education, and the terminological fog got even thicker as KPIs (Key Performance Indicators), TQI (Total Quality Improvement), QA (Quality Assurance), bottom lines, and so on added to the already dense educational lexicon.

Furthermore, toward the end of the 1980s, there was growing concern that Australia's economic productivity was slipping behind the rest of the "developed" world. Declines in some of our previously successful exports—especially wool—meant that Australia's economic future was unlikely to be as comfortable as before. The Hawke government saw a highly trained and flexible workforce as central to productivity improvement, which, in turn, was seen as essential to sustainable economic growth (Dawkins and Holding 1987). Consequently, there was an urgency to reform the VET sector to have a more important economic role than previously. The VET sector moved from being a service to the public in providing skills for employment and access-and-equity programs to being commercially oriented and a driver of economic change and productivity. It was these reforms that led directly to the changed conceptualization of distance education in VET and to its disappearance from the language, although not the practices, of VET.

Smith (2008) has reviewed these developments in greater detail; in summary, he drew attention to the following expectations and opportunities in VET that changed the landscape:

- The recognition of learning in workplaces as an important component of skills development

- The need for provision of VET to be broadened beyond the public providers and the encouragement of a healthy private-provider sector
- The introduction of competency-based training and assessment where certification would include major components of work-based assessment of skills and knowledge
- Technological advances in ICT that would enable distance education and other resource-based teaching practices to be integrated with on-the-job demonstrations, workplace practice, classroom learning, laboratory and group work, and so on

These expectations and opportunities combined to ensure the obsolescence of the centralized distance-education providers of VET, whose job had been the production and dispatch of largely print-based learning materials to rural and remote students. These providers ceased during the 1980s and early 1990s, and were replaced with new state-funded organizations that were principally responsible for the production of learning materials (Smith 2008). These new materials were largely electronically based, made available either as CD-ROMs or DVDs, or as Web-based material.

What is really different in these arrangements is that, not atypically across the Australian states, the central developing organization was conceptualized as a manufacturer and wholesaler selling the learning materials to retailers, who are the new VET providers. These new providers were publicly funded TAFE institutes and private providers. These "retail" providers enrol the learners, maintain their records, afford student and administrative services, and purchase the learning materials on a wholesale basis from the central organization to support the students' courses of study. Private providers number in the thousands and are found in nearly every town and village across the nation. Accordingly, local students can enrol with a local provider and be serviced on a local basis. Indeed, the need for the old-style distance-education provider has gone. Of course, life is never quite this simple. There are some rather more traditional distance-education-like practices, in which materials are mailed, for remote students whose local providers can't, or won't, provide the course required.

A nearby VET provider meets the needs of local employers and local industries. Such "enterprises" can accommodate local trainers who work with students in their workplaces to develop the applied skills needed.

Competency assessment is conducted within the same workplace. Again, the previous model of distance-education provision from a central provider was not able to cope with these sorts of requirements.

Contiguous with these changes was the displacement of the terms *distance education*, *off-campus studies*, and *technical extension* in VET by the term *flexible delivery*. Flexible delivery, however, was clearly acknowledged as having its roots in distance education, as the Australian National Training Authority (1996, 11) asserted:

> Flexible delivery is an approach rather than a system or technique; it is based on the skill needs and delivery requirements of clients, not the interests of trainers or providers; it gives clients as much control as possible over what and when and where and how they learn; it commonly uses the delivery methods of distance education and the facilities of technology; it changes the role of trainer from a source of knowledge to a manager of learning and a facilitator.

Observers of VET, such as Mitchell (2000) and Brennan (2003), have noted that online-learning initiatives have been largely led by people enthusiastic about the new technologies, or at least enthusiastic to sell them. These forces contributed to the term *flexible delivery* being hijacked by the term *online learning*. From about the end of the twentieth century, flexible delivery in Australia was commonly conceptualized and understood to be online learning. Those other face-to-face and workplace components of flexible delivery had been sidelined in the enthusiasm for online delivery. The result of the change to the meaning of the term *flexible delivery* was the adoption of another new term, *blended learning*, which meant online learning with face-to-face and other learning activities included in the mosaic of learning experience (Graham 2006).

In 2009, when we wrote this chapter, practitioners in the VET sector used the terms *blended learning*, *flexible delivery*, and *online learning* almost synonymously, with the term *online learning* perhaps reserved for situations in which (almost) the entire learning sequence is online. Using these terms fairly loosely and interchangeably is a clear indicator of fogginess, and the fog is not likely to clear soon. In 1997, Peoples, Robinson and Calvert pointed to the lack of precision around the term *flexible delivery* and

lamented the burden that the term had to carry. Almost simultaneously, Henry and Smith (1998) concluded from research across a wide variety of enterprises that although flexible delivery was enthusiastically embraced, no two understandings of it were the same.

## CONCLUSION

Behind the terminological fog is a landscape where late twentieth-century New Right politics sought to reconfigure distance education from a public good, serving those who were geographically or socially distanced from education, to a (quasi-)private enterprise geared to the engines of industry and commerce. This reconfiguration required turning public educational services into private or public educational enterprises and moving from supplier-driven services to consumer-driven products. Distance-education institutions were required to change from government-funded courses to provide "access and equity" for "disadvantaged groups" to being educational enterprises offering flexible delivery of flexible learning, paid for in whole or in part by the "consumers." In keeping with the times, the shift to flexibility meant that control also shifted, notionally to the consumer (the student), but often to industrial and commercial interests. The increased flexibility, choice, and "user-payment" reduced government control over some aspects of education. Releasing control over education, however, is anathema to most governments. Reducing control means increasing the risks that "undesirable" outcomes and events will occur. Therefore, various measures—usually in the name of quality assurance—are deployed to (self-)regulate the "education industry."

The earlier distance-education institutions were often concerned with control: instructional design ruled! Some institutions micro-monitored their tutoring and assessment to regulate both employees and customers. Some also formalized the evaluation of their courses to ensure that the customers were able to comment on each and every component and service. These forms of "instructional industries" (Evans and Nation 1989) used their monitoring and controls as risk management that protected them against harm, both internal (dissatisfied students, dodgy tutors)

and external (government reviews of performance, public [media] alarm over standards). In the move to flexibility, not only does the control shift and slip; the risks also change and increase.

Adding to these new forms of intervention was the enthusiastic marketing of educational software and learning-management systems to education and training providers—systems that provided a vast range of performance statistics for provider managements to use and misuse. While these online-learning systems have arguably been responsive to contemporary learner needs and preferences, widened accessibility, and provided levels of interactivity, they have also been gleefully embraced by governments and provider managements for their capacity to generate all sorts of performance data. These performance statistics, so easily available from the software supporting online learning, are difficult (if not impossible) to achieve with other forms of delivery, either off campus or on campus. The enthusiasm for online learning as the major form of education delivery is very attractive to managements and governments wanting more control and more data. It has, simultaneously, increased the thickness of the fog around what we once more clearly and confidently called distance education.

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## ABOUT THE AUTHORS

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Peter Smith began his lifelong relationship with distance education as a young graduate in a remote mining town in Queensland, Australia, when he enrolled in a distance-education course. That was 1971 and technology was different—but Peter found the experience a complete disaster. Being sent fourteen identical audiotapes was just one mishap of many. There must be a way to do it better, he thought. Since then, he has managed distance-education organizations in higher education and flexible-delivery providers in vocational education. At the age of fifty, he became an academic, with distance education and vocational education as his foci. His doctoral thesis won the 2000–2001 Open and Distance Learning Association of Australia Award for Excellence, and he has since published many papers and two books. www.deakin.edu.au/arts-ed/education/staff-directory2.php?username=pjbs

# 18 › Flexing Costs and Reflecting on Methods

GREVILLE RUMBLE

Flexible learning affects the cost of individual courses and may also seriously disrupt the cost structure of an institution, such that resources will need to be deployed in different ways. This is true both for institutions that mix traditional classroom approaches with technology-based applications and for funders of national education systems that mix distance teaching and traditional methods.

The cost structure of an institution (and indeed, of an individual course) reflects the mix of committed (or fixed) and flexible (or variable) costs. The latter change with movements in volumes of activities. Cost structures are also affected by the mix of capital costs (i.e., investment in course design, systems design, equipment, etc. that has a useful life of more than one financial period) and operating costs (the cost of items that are consumed within the financial year and therefore have to be replaced). Since each technology has its own distinctive cost structure, institutions using a mix of technologies may have very complex situations to manage.

The differences in cost structures have invariably posed problems for those funding the activity (Swinerton and Hogan 1981; Snowden and Daniel, 1980; Smith and Bramble 2008), but behind the cost structure lies another management problem—the effect of adopting technology-based approaches on the jobs of staff, and in particular on staff workloads.

## HUMAN RESOURCES AND STAFF TIME: THE CRUCIAL RESOURCE

Labour costs constitute a high proportion of the total costs of face-to-face teaching, given the direct relationship between the number of students or class hours taught and the number of teachers. In technology-based

approaches, materials replace teachers as the main source of information and content, and this encourages us to see the process as one in which capital (in the form of course materials and support systems) replaces labour. However, this hides the fact that much of the cost of this "capital" is a labour cost. Academic staff engaged in the development of distance and online teaching materials spend many hours designing and developing the materials. Depending on the technology used, they are also likely to require support from a range of technical staff. Thus, the jobs they do and the structures within which they work are likely to be very different from those encountered in a face-to-face environment. Also, the materials produced may be used for several years without significant (or any) modification, so the design and development work on a particular course is not done every year. Indeed, it may be several years (even eight or ten) before a course is redeveloped. This is very different from face-to-face teaching, where labour needs, year by year, hardly vary, provided student numbers are stable. Also, because in technology-based approaches the design and development phase is separated from the delivery phase and because the use of mass-media materials allow more students to follow a course than the designer/developer could possibly look after in the delivery phase, there is often a division of labour between those who design and develop courses and associated materials, and those who teach, assess, and advise students.

*Labour Costs of Materials Design and Development*

The major issue in designing and developing materials is that it takes more hours of academic staff time to develop the materials needed to occupy a student for one hour than it does to develop a one-hour lecture or seminar. Sparkes (1984, 219) drew on his experience early in the development of the UK Open University to suggest that whereas it took a lecturer two to ten hours to prepare a one-hour lecture, and one to ten hours to prepare for one hour's worth of small-group teaching, it would take ten to twenty hours to prepare a one-hour radio program or a one-hour audiovisual sequence (in which the lecturer used recorded audio to talk a student through some text-based activity), fifty to one hundred hours to prepare a teaching text that would keep a student occupied for one hour, one hundred-plus hours to prepare one hour of broadcast television material,

two hundred-plus hours to prepare computer-aided learning materials that would engage a student for an hour, and three hundred-plus hours to prepare an interactive video. Moreover, many of these (broadcasting, text, computer-assisted instruction, etc.) would require additional professional and technical staff in a support or directorial/production role.

Studies by Arizona Learning Systems (1998) showed how much the cost of developing a standard American three-credit online course could vary, depending on the nature of the technologies used to design and develop a computer-deliverable course. Costs ranged from US$6,000, for a course involving a simple course outline and a series of assignments, to US$1 million for a course incorporating virtual reality technology. In all cases, the bulk of the cost was driven by the time that academic and expert staff expended on developing materials.

The process of changing technologies, such as moving from face-to-face to online provision, can also be costly. Boettcher (2006) drew on anecdotal evidence plus real experience to suggest "with some level of certainty that it can take an average of about 18 hours—of faculty time—to create an hour of instruction that is on the Web." Given that the typical three-credit-hours on-campus course in the United States has forty-five hours of class time, Boettcher calculated that it would require "an investment of 810 hours to move a course to the Web," which, with "time for startup with learning technology and instruction in teaching and learning in this new environment (and also arranging for any copyright and other issues)" could "rapidly approach the 1,000-hour mark for moving a course to the Web—given our current models." When we compare the 180 to 200 hours "release time" that a typical American faculty member gets per semester to the 810 to 1,000 hours that Boettcher estimates would be required "to move a course to the Web," it is obvious that the transition from face-to-face to online teaching is likely to be problematic (Boettcher 2006). A more recent survey of faculty attitudes to online learning found that more than 85 percent of academic staff believed that it took "somewhat more" or "a lot more" time to develop an online course, while fewer than 2 percent thought that it took less time (Seaman 2009, 26). More than three in four staff members also thought that developing an online course took even more time than teaching one: since 64 percent of staff thought that *teaching* an online course takes "somewhat more" or "a lot more"

time than teaching a face-to-face course (Seaman 2009, 27, 26), the impact of online learning on faculty workloads should not be underestimated.

Offering stipends to faculty members to develop materials—a common practice in American universities (McCarthy and Samors 2009, 31)—may act as an incentive for some faculty to get involved in flexible learning, but it will not solve the essential problem: that there are only so many hours that a person can reasonably be expected to work in a year and that one cannot eat into employees' leisure time forever. Ultimately, a solution has to be found that releases staff from existing duties if they are asked to do new things. Quite rightly, McCarthy and Samors (2009, 32) see the long-term solution being non-financial incentives to participate in course development. Smarter working methods may help, but the key, I suggest, lies in release time.

Certainly, when technology-based "open learning" approaches began to be introduced into traditional further-education colleges in the UK in the late 1970s and 1980s, debates about the resources needed to fund the changes focused not so much on money but on how the staffing needs of a change in practice could be met (Birch and Cuthbert 1981, 1982). The challenge was giving academic staff release time to develop materials when the staff already had a full face-to-face teaching and administrative load. What proportion of a person's teaching load equated with the task of preparing materials? Should the institutions bring in temporary help to create the materials or to stand in for the staff they want to release? Or should they ask the staff to work even harder now, in the expectation that by using flexible-learning approaches for *all* students (including those on campus), the academics would have a lighter teaching load in future years, thus allowing them to do other things, such as conduct research or develop new courses?

The challenges they faced also led institutions to look for cheaper approaches to materials development. One way of reducing labour costs is to hire staff on contracts *for* service to do a particular job—to write a particular course or copy-edit a particular book—rather than employ permanent staff on contracts *of* service. This is not an either/or choice: the UK Open University has a permanent academic and support staff supplemented by people brought in on contracts for service. However, with its permanent academic community, it is a very different kind of organization

than the UK National Extension College, which operates at secondary-school and further-education levels and which hires in course writers as required to develop all its courses. Contract staff cost far less than permanent staff with all their non-productive time (holidays, sick leave) and on-costs (insurance, allowances), although there may be some additional management costs involved in managing a large force of casual staff.

There are other ways of reducing the labour costs of designing and developing materials. "Wraparound" courses, in which limited amounts of materials guide students through existing materials (either commercial or bought in from another provider), significantly reduce the amount of materials that need to be developed in-house. Project-based courses achieve the same thing by asking students to research and write up their own projects. Hülsmann (2000) draws a useful distinction between student learning hours (courses) and student learning hours (media). In brief, course designers have an idea of how many hours the average student will spend studying for a course (course hours), and they also have an idea of the number of hours students will spend studying the materials they provide (media hours). The difference between these two figures represents the student's "independent" study hours. Table 1 shows the course, media, and independent student learning hours for three courses and the ratio of course hours to media hours. The higher the ratio, the more one is essentially relying on students to construct their own course.

Whether one thinks this is a good thing probably depends upon what one is trying to do and where one stands on constructivist theories of education. Those who subscribe to constructivist theories of learning will put "the onus on them [students] to construct knowledge. This means giving greater space for reflection, discussion, questioning, and argument and for adopting greater equality between teacher and student" (Daniel, West, and Monaghan 2008).

Using other providers' materials can have its problems. Some institutions have agreements on the sharing of materials, but generally buying in courseware has been bedevilled by the providing institutions' attempts to recoup their development costs through licensing and copyright fees. This is why the nascent open-courseware movement (e.g., MIT's OpenCourseWare and the UK Open University's OpenLearn

Table 1: Course, media, and independent study hours compared

| Course | Student Learning Hours (SLH) | | | Ratio Course SLH to Media SLH |
|---|---|---|---|---|
| | Course SLH (total SLH) | Media-driven SLH | Independent SLH | |
| UK Open University: Second-year undergraduate course in health and social welfare | 220 | 135 | 85 | 1.6 |
| UK Open University: Second-year undergraduate course in mathematical modelling | 448 | 306 | 142 | 1.5 |
| Anglia University, UK: Course on domestic violence and sexual assault for health and social workers | 200 | 47 | 153 | 4.2 |

Source: Adapted from Hülsmann 2000, 42.

projects) and the Commonwealth of Learning's WikiEducator progam (Daniel, West, and Monaghan 2008; www.wikieducator.org) are so exciting. However, the Creative Commons licenses (www.creativecommons.org/about/licenses/meet-the-licenses) governing the use of open educational resources (www.oercommons.org) carries a sliding "scale" of restrictions on use.

Not everyone wants to adopt whole courses, or even significant chunks of courses, which is why there is so much interest in reusable learning objects. What has never been satisfactorily explored—at least to my knowledge—is the time cost of sourcing and negotiating the use of appropriate learning objects. Given the cost of sourcing materials, adapting materials, translating them (which is hugely expensive to do well), and acquiring licenses, it can just be quicker (and cheaper) to start all over.

The evidence from the experience of distance-teaching universities and dual-mode institutions suggests that institutions trying to adopt flexible-learning approaches while at the same time maintaining a campus-based program will always find it difficult to release staff to develop learning materials unless they can call upon a significant development fund or unless they change slowly. So the real answer is to find a different way of encouraging learning that relies less on home-produced or bought-in materials and more on students finding their own materials.

*Labour Costs of Supporting and Assessing Students*

Early commentators understood that the investment in materials development to support distance education would only lower average costs per learner if one significantly reduced the cost of the face-to-face teaching element in distance education. "Pure" distance programs, of course, offered no face-to-face teaching at all. In such systems, teacher-student interaction is reduced to tutor feedback on assignments coupled, if one is lucky, with a limited advisory service responding to students' written, texted, or telephoned queries.

The lack of opportunities for frequent, "natural," spontaneous, and rapid dialogue between teachers and students, not to mention among students themselves, was seen by many as diminishing the quality of the distance-educational experience. Telephone teaching and audio-conferencing approaches were developed and used extensively by some institutions in the UK, Canada, and the United States. However, in some jurisdictions, high telephone charges and measured service rates coupled with the drawbacks of the technology (the need for timetabled sessions and limitations on the number of participants) meant these technologies were seen as at best an ancillary aid. Not until the development of online learning did distance educators really feel that they had an opportunity to overcome spatial separation while maintaining channels for rapid, natural, and spontaneous dialogue with students and between students through computer-based conferencing and email systems. Although synchronous conferencing is possible, the majority of systems have relied on asynchronous conferencing, which has the advantage of not requiring contact times to be pre-arranged. The rapid acceptance of texting through mobile devices has increased such opportunities, and increased bandwidth and the conflation of text, audio, and video communications through a common platform (computer, mobile, etc.) can only add to the possibilities available for rapid, natural, and spontaneous dialogue across distance.

Yet these developments raise old questions about the use of resources. Distance-education systems that provide scheduled (and hence time-limited, synchronous) classes, whether face-to-face or by different forms of conferencing (audio, video, computer), can quickly establish the costs involved in terms of time and money, assuming additional payments are

made to staff or adjuncts. Indeed, in time-management terms, there is nothing like a scheduled class to control costs. However, a requirement to support students whenever they need it suggests an open-ended commitment that comes sharply into focus when we consider the costs of supporting students online either as a group (in conferences) or individually (e.g., through email).

For the past ten to fifteen years, there have been attempts to estimate the impact of online teaching on academic staff time. Conflicting messages have emerged from the studies that are available, with the overall impression appearing to be that online teaching is more time consuming than both traditional face-to-face education and "traditional" distance education courses (see Rumble 2001), with the latest extensive survey suggesting that nearly two out of three (64%) academic staff believe that it takes "somewhat more" or "a lot more" time to teach an online course as opposed to a face-to-face one (Seaman 2009, 26), without actually defining what "somewhat more" and "a lot more" means in actual hours worked.

## REFLECTING ON METHODS

Research suggests that technology-based teaching impacts on staff time, with Seaman (2009, 33) reporting that the additional time needed to develop and deliver online courses (and I suggest that the same would be true of the development, though not the teaching, of distance courses) is seen by faculty responding to the recent Association of Public and Land-Grant Universities survey as "the most important barrier" to the adoption of online learning. Materials development tends to be time consuming, with the potential to push labour costs significantly up. Certainly, the evidence on teaching seems to show that, in comparison to face-to-face teaching, correspondence-based distance education reduces the time spent teaching and supporting students, while teaching online is more time consuming than correspondence education, even when coupled with limited face-to-face education, and generally more time consuming than face-to-face education.

There are ways of reducing the labour costs (as distinct from hours)—notably by restricting the input of both learning materials and "contact

hours" (however delivered). But the question then arises: does this not diminish the quality of the academic experience for students?

Daniel, Kanwar, and Uvalić-Trumbić (2008, 9) report on a meta-analysis of six hundred papers on distance education by Bernard et al. (2009), in which the latter distinguish three types of interaction in support of learning: student-content, student-student, and student-teacher. Bernard et al. asked which type of interaction, when increased, most enhances student performance. Surprisingly, given that learners constantly reported demand for increased interaction with a teacher, they found that increasing interaction with content was most effective and that increasing interaction between students did more for their performance than increasing interaction with teachers. In other words, fostering student self-help groups and interchanges is likely to be more effective than increased personal tuition, though less effective than increased interaction with content. Daniel, Kanwar, and Uvalić-Trumbić conclude from the evidence now emerging that increasing teacher-student contact (which is often what students want) is actually more costly and less effective than the other two options. The choice then comes down to providing more materials and/or enabling student-student interaction. I have suggested, however, that adding to the volume of materials provided in-house or through purchase-in is costly. It is also unnecessary, given the increasing wealth of materials on the Web. What students need is guidance on which of these materials to use—and here access to electronic books and journals becomes crucial. They also need to be encouraged to work with their peers.

These possibilities of student-student interaction and materials access are being greatly facilitated by the emergence of a group of Web-based technologies that ride upon the emergence of Rich Internet Applications (RIA) browser technologies. These applications, which include the following, collectively allow for enhanced collaboration and interaction.

- Blogs: posting user-generated content and opinions with opportunities for posting comments on the original, and the use of "pingback" to alert contributors to the presence of comments on their contribution
- Wikis: generating user-developed documents that can be easily

edited by anyone, thus bringing people together to harness collective wisdom
- Tagging and social bookmarking of sites to create an archive of sites/documents that can be organized and shared with others
- Podcasting/audio blogging: enabling access to talks, interviews, and lectures
- Multimedia sharing
- Social networking sites, where like-minded people can interact
- Crowdsourcing: in essence an approach that poses requests, issues, or problems, and seeks solutions from anyone; also an approach that seeks content from users, whoever they may be
- Aggregation services that gather information from across the Web
- Data mash-ups that pull data together from a variety of sources
- Collaboration, including in publishing and working

Often referred to as Web 2.0, such approaches have the potential to change the economics of online learning given their basis in mass collaboration, sharing, open source, and non-monetary reward.

Budgeting and costing flexible-learning programs continues to be a challenge. It will not be solved if regulators continue to fail to acknowledge that presential class-based learning, distance learning, and online learning have different cost structures. In the UK, for example, the system-wide Transparent Approach to Costing (TRAC) now distinguishes among teaching, research, other (commercial ventures, conferences, etc.), and support costs (Financial Sustainability Strategy Group 2009), but fails to subanalyze teaching costs by mode or to recognize that, with respect to teaching costs, there is an important distinction to be drawn between the cost of investment in systems and content/materials that will have a useful of life measured in years and the costs of supporting and assessing students' learning, which—as with all service costs—are consumed at the moment of delivery. Yet TRAC could be extended to cover this issue. Meanwhile, until this key distinction is recognized and financial systems are designed to support the analysis of teaching/learning costs along these lines, institutions that to date have been in the main engaged in face-to-face teaching will continue to face what McCarthy and Samors (2009, 25) note as the greatest challenge in financing online (and I would

add, distance) learning—the problem of securing and distributing money to develop and sustain such programs. Furthermore, it is not just a question of the initial launch into distance and online learning. McCarthy and Samors (2009, 25) report that money is often made available up front to start a program off, but sooner or later the materials get dated and need to be replaced—and money needs to be set aside to ensure that this happens. Ironically, none of this is new to those who have worked in "pure" distance education, but it's a real challenge for those whose teaching costs have by and large been driven by the logic of service industries, where the cost of service delivery is tied to what service providers often call "the moment of truth" when provider and consumer interact. It is this that underpins the problems facing institutions embarking on flexible learning: how do they shift from an essentially service-based economy to one that requires longer-term capital investment and renewal? My suspicion is that Web 2.0 approaches may mitigate the financial challenges but at the cost of new challenges—not least, quality assurance.

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## ABOUT THE AUTHOR

Greville Rumble was educated in Ecuador, using the home-study materials of the Calvert School in Maryland prior to attending school there, in Switzerland, and in England. He is a freelance consultant working on issues around distance-education policy at national and institutional levels and on the planning, management, costs, and funding of distance-education systems and projects. Previously, he worked at the UK Open University as an administrator and, more recently, as professor of Distance Education Management. While gradually deepening his experience, he authored numerous books, chapters, and articles in these fields, drawing on his experience in Latin America, Asia, Europe (including the UK), the Near East, and Africa to focus, at the expense of techno-fixes, on realistic and affordable solutions for developing-country environments.

# 19 › "Which Is to Be Master"? *Reflections on Ethical Decision Making*

MELODY M. THOMPSON AND LORNA KEARNS

> "When I use a word," Humpty Dumpty said, in a rather scornful tone, "it means just what I choose it to mean, neither more nor less."
> "The question is," said Alice, "whether you *can* make words mean so many different things."
> "The question is," said Humpty Dumpty, "which is to be master—that's all."

How is a quotation from *Through the Looking Glass* appropriate to a discussion of ethics in flexible education? We think Lewis Carroll's humorous dialogue reflects two prominent characteristics of flexible-education discourse: ambiguity and power. Both factors exert considerable influence on the process of ethical decision making, and that process is the focus of this chapter.

Flexible learning has been a part of adult-education discourse and practice for decades; however, the meanings associated with it have varied considerably over time. Such ambiguity creates challenges in communicating about flexible education; it can also create barriers to practicing it responsibly. Without a shared understanding of this concept, there is no firm basis for deciding "whether to support or resist the changes that parade under the banner of flexibility" (Nunan 2000, 50).

One factor behind this constantly shifting discourse is the many forces and conflicting agendas shaping flexible education. Each suggests a different "master'" of both the rhetoric and practice. Trying to negotiate these forces and agendas may cause us to conclude that politics or impersonal forces such as the economy or globalization—rather than personal values—are more in control of our own practice than we are ourselves. We may even feel that we have no choice but to compromise those values

when they conflict with others' goals or decisions, especially when they are determined by those at higher levels of power. How can we negotiate the competing demands of multiple would-be masters in a way that keeps our personal and professional integrity intact?

We discuss this question as reflecting the moral-ethical dimensions of flexible-education practice. We do not suggest how you should act in particular situations, but we do encourage you to consider the importance of personal analysis and decision making as the basis for ethical day-to-day practice. These processes are a necessary foundation for flexible education that is not merely sustainable, but also *sustaining*: that is, that supports and strengthens the learning projects of individuals, groups, and communities.

## FLEXIBLE EDUCATION: POLITICAL OR MORAL UNDERTAKING?

We began with the metaphor of "mastery" because it suggests power and control, two concepts so prevalent in contemporary educational discourse. In the scholarly literature, it's assumed that all education, including flexible education, is "political," meaning that it reflects differing, sometimes inequitable, distributions of power (e.g., Jakupec 2000; Cervero and Wilson 2000; Sissel 2001). Various examinations of the concept of flexible education emphasize benefits to those at different places in the social and educational power hierarchy (as you read in other chapters). Is the flexibility manifested in the production of flexible employees, thus benefiting employers? Is it the hope of institutions looking for flexible alternatives to brick-and-mortar expansion? Is it access to an education no longer in-flexibly bound by age norms, standardized levels, and traditional formats, thus benefiting learners who missed out "the first time around"? Does flexibility consist in allowing instructors to teach in ways that express their own goals and needs as professionals? Flexible education can be all of these things, but it cannot serve all stakeholders equally in each context.

We agree with Nunan (2000, 50) that "as educators, we must be clear about the social values that we trade in when we embrace discourses, methodologies, and ideologies that employ the term flexible."

But education is not just social and political; it is also an individual *moral* undertaking (Newman 1999). Political analyses don't provide final answers; they "open on to normative perspectives, to questions about our fundamental values" as individual practitioners (Herman and Mandell 1999, 17).

Recognizing the moral dimension of flexible education helps us to express effectively—rather than to compromise—our values in practice. Answers to our most basic questions—who *should* be served by flexible education? what *should* flexible education entail? and who *should* decide?—depend on personal judgments. Some of these judgments depend on our personal beliefs of right versus wrong; others reflect our attempts to decide between good and better approaches or between possible and seemingly impossible courses of action (Weston 2009). These are moral judgments, based in personal world views and values. However, since none of us live or practice outside of a social context, such personal moral judgments are shaped and mediated by our culture and society and then further influenced by the organizational contexts within which we practice flexible education. Learning how to balance and negotiate these many factors is an ongoing process.

Compromise is inevitable in any kind of social context. Although we may strive to be "true" to our values and goals as individuals and educators, negotiation and compromise are abiding characteristics of our practice. But how do we decide when deliberative compromise is appropriate and when, regardless of personal costs, we should stand firm and refuse to compromise? No single answer, appropriate for everyone, exists. But we do have strategies and resources that we may use to clarify contextual ambiguities, formulate our own answers, and stay grounded in our own values.

One of us teaches a course as part of an online master's program in adult education that uses many such strategies and resources. We'll discuss how they help us to understand the ethical dimensions of a situation and decide on a course of action that integrates our integrity as individuals and professionals with our commitment to collaborative and collegial action. In this way, the focus changes from "taking sides" to determining "what each side is right about" (Weston 2009, 13).

We'll first give some general background on the process and approach we're advocating. Then we'll offer some examples of ethically charged

choices that many flexible educators must make on a day-to-day basis. We finish with some focused questions intended to further your own "ethical fitness" (Burge 2007, 107).

The course, entitled "Teaching Adults Responsibly," helps students to understand and negotiate the social, organizational, and personal (identity) factors that influence their ability to practice their own ideas of responsible teaching.

Most of the students are educational practitioners, but initially, they exhibit a lack of experience in focused ethical reflection. While they show "plain moral competence" (Walker 2003, 8)—the recognition that values and principles should guide their actions—they are generally not able to clearly articulate those values and principles or what ethical practice means *to them*. Thus, they fit Burge's description of professionals who are "unable to distinguish all the competing rights in an ethical dilemma or . . . unwilling to reason their own way to a decision" (2007, 108).

Although the students have little or no experience in focused reflection on ethical issues in their practice, they bring many examples of personal practice experiences that they recognize as having ethical dimensions. Their examples include mandated curricula or teaching methods that they believe are inappropriate for their students; a requirement to use assessment instruments that they suspect have little relevance beyond providing data to sponsor agencies; institutional implementation of teaching-learning technology without staff training, or that limits access for many potential students; and pressure from administrators to cover up poor performance by another member of the teaching staff. From the starting point of their experiences and stories, the students quickly become engaged in exploring different theories, concepts, and resources as the basis for developing their personal approaches to responsible, or ethical, teaching of adults.

The first resource we discuss here is the one that the students initially welcome as an *apparent* source of definitive answers: abstract systems of ethics that have been developed and taught over millennia. Burge (2007) reviews some classic ethical decision-making frameworks as she encourages distance-education and online-learning practitioners to accept "the real challenge in being one's own applied ethicist" (110). Each ethical framework emphasizes a different idea of what is deemed to be right: "the

greatest good for the greatest number," "justice or fairness," or a "virtuous character," among others. Each approach seeks an appropriate balance between rights and responsibilities, based on a unified system of uniform core values, social goals, and actions that express these (see, for example, the Markkula Center for Applied Ethics, www.scu.edu/ethics/, and the W. Maurice Young Centre for Applied Ethics, www.ethics.ubc.ca. Reflecting on such differing values and goals may help practitioners to identify which ones are most important to them.

However, the students, themselves practicing educators, soon notice some limitations to such formal ethical frameworks. First, these formal frameworks ignore or minimize the importance of the students' particular contexts, contexts that not only suggest, but sometimes demand, negotiation and compromise. Second, such systems emphasize a single core value, offering little help in prioritizing the multiple values, goals, and responsibilities that apply in people's personal and professional lives. And third, ethical systems are often presented through the device of "ethical dilemmas": short, overly simplified scenarios to which readers or students are asked to apply these universal ethical principles as a way to "judge" the rightness or wrongness of actions that have already occurred. Weston (2009) offers the example of educators who ask students to apply the principles of these systems to fixed ethical dilemmas as a way to "develop" a framework for moral-ethical decision making, particularly in traditional-aged college students. However, flexible-education practitioners are more likely to need guidance in bringing the analytical process to consciousness, reflecting on it, and refining it than in developing it from the bottom up. And practitioners don't need guidance in judging others' behaviour as ethical or unethical; rather, they need help in forming their own judgments about how they themselves should *act* in practice environments that are complex and in which the forces operating on them—as well as their own goals and responsibilities—are often conflicting and difficult to negotiate.

Although a knowledge of formal ethical frameworks doesn't provide the practical guidance necessary for day-to-day ethical decision making, it is a good resource and starting place for thinking about ethical practice. Introducing students to these frameworks also helps them to clarify what exactly they do need to guide their professional decisions. And although

it is initially surprising to these practical-minded students, one thing they need, and will soon begin to apply to their own situations, is good theory.

Kurt Lewin, often referred to as the father of social psychology, once wrote that "nothing is more practical than a good theory" (1951, 169). The students soon find that some of the most practical theories they need to know for ethical decision making are those that deal with organizational structure. Our own experience in moving back and forth between the administrative side and the teaching side of a large university has revealed how little understanding each group has of the others' needs, goals, or even value to the organization. Even a brief introduction to tools that allow them to analyze the roles, processes, structures, and conflicts that characterize their specific organizations helps these practitioner-students to begin understanding the multiple factors that influence their ability to practice ethically. Once they understand these factors, they can consider how best to negotiate between organizational forces and their own values and beliefs about ethical practice. The students also examine three educational theories—functionalist, conflict (Marxist), and interpretist (Feinberg and Soltis 2004)—that entail different beliefs about society, the relationship between individuals and society, the role of education in society, the "proper" relationship between students and teachers, and so on. The students begin to see how the organizations within which they teach overtly or more subtly reflect particular goals and values, which may or may not reflect their own.

It is equally important to understand ourselves and our relationship to our context. As Margaret Urban Walker (2003) notes, each of us operates within a web of influences and responsibilities that determine the things that are most important to us and suggest how we should act in a specific situation. Yes, there is a universal aspect to our moral judgments: they reflect the shared nature of human concerns, those structures and interests about which we care deeply and in which we find meaning. However, these elements are not arranged and emphasized uniformly across everyone's lives. The particular nature of real life is reflected in the way individuals develop, prioritize, and live out their own values (Walker 2003), a particularity not reflected in universal ethical frameworks.

What practitioners need is not a universal framework that we can apply personally but rather a coherent and stable *personal* framework

that reflects the particular nature of our lives, our values, and our practice contexts. Therefore, students get readings and activities to help them clarify both their personal and professional values and identities (e.g., Appiah 2005).

Through analyzing social, organizational, and personal dynamics and conflicts, each student comes to see that in an ethically reflective person, private life and professional practice are not separate spheres. On the one hand, personal ideals and values have a role in "giving meaning to work [and] interpreting professional responsibilities" (Martin 2000, vii). On the other hand, although a person's "moral persona" (Walker 2003, 9) is the core of his or her ethical context, it is neither static not completely private. Finally, the course discussion emphasizes the importance of community in helping practitioners to overcome one of the biggest challenges to ethical decision making and action: incomplete information. We live and work in situations in which all the information needed to make an ideal decision is seldom available (Walker 2003). Nash (1994) exhorts us that "every resolution to an ethical dilemma . . . must consider the act, the intention, the narrative, the community, and the political structures" (quoted in Burge 2007, 111). However, his comment disregards the partial nature of the evidence available to us as limited, fallible human beings. Yet because we live and work in community, we have communication possibilities that can take us beyond our personal limits. Rather than thinking *for* others, we can (and should) think *with* those who are affected by our decisions, including our students, our peers, and others within our organizations (Walker 2003).

Finally, just as information gathering should not be a solitary activity, neither should our analysis of this information. Certainly, solitary reflection has an important place in moral-ethical decision making. However, unless we expand our analysis beyond solitary reflection, we may attain only a narrow and unnecessarily partial view by excluding perspectives that challenge our interpretation (Walker 2003). In the course "Teaching Adults Responsibly," students practice this collaborative process through group projects and peer reviews of each other's analyses of their teaching experiences. In this way, each person gets multiple perspectives on how he or she might best balance and negotiate all relevant factors to allow ethical action. As a result, often what had seemed to be a relatively simple

decision, suggesting an "obvious" ethical response, is revealed through collaborative examination to have been "in flow and open to change through ongoing engagement" (Weston 2009, 9).

We now leave the context of this course to offer you key questions focused on building "ethical fitness."

## BUILDING "ETHICAL FITNESS"

A big part of ethical engagement is asking questions. We agree with David Naugle's insight that "human life is largely carried out in the interrogative mood" (2002, 83). Coming to understand what we do and why we do it is very much a process of asking ourselves challenging questions and searching for answers. In this spirit, we don't propose to analyze or judge others' specific decisions. Instead, let's question some common teaching practices and their ethical dimensions as a way of developing greater capacity for ethical thinking.

Teaching staff have to analyze their context and their curricula, and make many decisions, few of which are neutral in their impact. Our focus below is on decisions about objectives, course materials, technology, instruction, and assessment. In thinking about each of these practice-related issues, take a few moments to ask yourself three personal questions related to ethical decision making: (1) What do I think would be right and wrong behaviour *for me* in regard to this activity? (2) Are my current practices in accordance with my perceptions of right behaviour? (3) Would I be willing to tell others what I am doing and be able to explain why I believe it to be right? (Carter 1996). Your answers are likely to give you some good insights into your own values and beliefs about what it means to practice ethically.

### *Objectives*

Objectives are generally set in response to someone's (including, but certainly not limited to, the learner's) perception of general or specific "learner needs." For example, employers see the need for workers who are skilled and can think critically in a globalized economy, content experts see the need for students to gain discipline-specific knowledge, and

learners may express a need for a credential that leads to advancement or for knowledge and experiences that promote personal development. Each of these stakeholder groups has more or less influence on objectives.

Questions: How are our learning objectives determined? Which stakeholder groups benefit from the chosen objectives? Which stakeholder groups have input into the decision and which do not?

*Course Materials*

The course materials from which teaching staff may choose come from a multitude of sources, in a wide variety of forms, and with many characteristics that make them more or less appropriate in different contexts. Some are free and readily available to those with online access. Others come from for-profit sources and may be costly. Some are inaccessible to students with various disabilities. Others are culturally specific and reflect the experiences of a relatively narrow range of students. Almost all include at least some content that overtly or unconsciously reflects the political nature of education. Finally, many materials have complex restrictions on their distribution and use intended to protect the rights of authors and publishers.

Questions: On what basis are course materials chosen? Whose interests are served by the content of the materials? How is educational access limited or enhanced for certain populations of learners by the specific materials chosen or produced? To what extent are diverse learner needs and characteristics represented in choice of materials? To what extent are teaching staff aware of the legal restrictions on the use and distribution of materials? To what extent do they feel bound by such restrictions?

*Technology Choice*

Here we use the word *technology* in its broadest sense, meaning not only physical tools such as information and communication technologies but also systematic methods of organization designed to structure human activity. Technology choices might range from PowerPoint presentations in a classroom, to Web-based courses offered to distant students, to "weekend colleges" offered off site. Classic course-design principles specify that technology choice should be determined by learning objectives and mediated by related factors. However, decisions are often influenced

by other factors such as cost, availability, convenience (for the institution, instructor, or students), and instructor willingness (or unwillingness).

Questions: Are educational benefits the primary factor in technology choice? Does the choice of technology limit access by particular student populations? Whose needs (institution, instructor, learner) are given priority, and why?

*Technology Use*

Educational technologies support traditional teaching-learning activities. However, two additional affordances in Web-based courses are preservation of participants' text-based interactions and surveillance of students (Anderson and Simpson 2007) at a level well beyond what is possible in traditional courses. Most course-management systems (CMSs) allow instructors to monitor and record students' activity in a course, often without the students' awareness. Even when the records aspect of the CMS is transparent to students, the instructor can add a non-detectable layer of surveillance by creating a fictitious or "virtual" student, who appears to others in the class as a legitimate participant ("Who is Bill Reed?" 2005; Nagel, Blignaut, and Cronjé 2007).

Questions: What weight is given to student privacy and/or confidentiality in decisions about how technology is used? Are students notified as to the type and extent of data gathered and how it will be used? How are the benefits and drawbacks of unconventional technology use evaluated?

*Instruction*

Traditional responsibilities of instructors include meeting classes regularly, being accessible to students, providing feedback on assignments, and facilitating activities in support of learning objectives. However, familiar activities can suddenly seem unfamiliar in flexible education environments. The delivery medium may be different. Student populations may be non-traditional in age or goals. Some may be located in other countries, have difficulties with the language of instruction, and have different cultural expectations for the teaching-learning experience (Shattuck 2005; Al-Harthi 2005).

Questions: How well do instructors understand the characteristics of their students? Should instructors modify their teaching approach for

different populations of students? Are students from other cultures marginalized by dominant cultural assumptions? Do instructors feel different levels of commitment to traditional and online students?

*Assessment*

Designing assessment systems requires skill in creating approaches that effectively measure learning outcomes. As Rowan (2000, 164) notes, the "natural and normal" approach in university education is most often the written examination. However, differences between flexible and traditional post-secondary education may suggest the need for alternative assessments such as group projects or student portfolios. A new factor in assessment is reliance on technological means for detecting plagiarism (e.g., Turnitin; see turnitin.com/static/).

Questions: On what basis are assessment choices made? What weight is given to matching the goals of flexible education with assessment methods? Is students' potential unfamiliarity with the formal academic environment recognized and addressed in communicating expectations? Are students' intellectual property rights considered, particularly in decisions to submit papers to an external entity's database?

## CONCLUSION

Each question above represents a single decision but connects to the others in the web of activities, values, decisions, and relationships that defines an educator's context. "Mastery," as we used the word at the beginning of this chapter, can mean control and power, but it can also mean having great skill. To practice ethically amidst complexity, we need to be skilful in recognizing the ethical dimensions of our practice and in prioritizing our own values when confronted with competing goals and choices. We need to come up with our own answers to the questions: What does flexible education mean *to me?* What guides my decisions about who to teach, what to teach, how to teach . . . even why to teach?

Yet even when we're clear on our own values, we may often choose to compromise, since teaching is a social practice involving relationships with organizations and other individuals with their own ethical standards.

As Weston argues (2009, 17), "It's not so much a matter of 'choosing sides' as of just doing the work before us as well as we can . . . meantime resolutely and visibly expecting everyone else to approach it in the same way."

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## ABOUT THE AUTHORS

Melody Thompson spent years protesting, "I'm not a *distance* educator; I'm an *adult* educator." She finally saw the writing on the wall and decided that if distance education was going to be an integral part of adult higher education, she wanted to be among those making it the best it could be. She first worked as publications editor of the American Center for the Study of Distance Education, and then spent nine years as an administrator assisting the birth and early growth of Penn State's World Campus. In her current position teaching and advising in the Adult Education Program at Penn State, she tries daily to implement the philosophy *Docendo discimus* (We learn by teaching) in her work with resident and online graduate students. www.ed.psu.edu/educ/adult-education/faculty/melody-m-thompson

Lorna Kearns came to distance education through the information-systems door. After several years working in computing services at the University of Pittsburgh, she began teaching information-systems courses at Carnegie Mellon University, participating in one of its early distance-education initiatives. As instructor, advisor, and program director of Carnegie Mellon's Master of Science in Information Technology program, she developed a profound appreciation for the intellectual curiosity, professional commitment, and personal potential of mid-career distance students. Inspired, she entered Penn State's Adult Education PhD program in 2006. Like many an adult student, she juggles school work, family, and career. She's now back at the University of Pittsburgh as an instructional designer with the Center for Instructional Development and Distance Education.

# FIVE

## › VOICING CONTRARIAN OPINIONS

# Introduction

In the chapters that follow, three colleagues show where the rhetoric of hope and hype meets the reality of expectations and expediencies. David Harris, like Adrian Kirkwood and Alan Woodley, has enough experience and insight to point out "the paradoxes that accompany flexibility in higher education and that are responsible for uneven uptake and variable practices." Such paradoxes are not new but are sometimes difficult to detect within seemingly benign, even helpful institutional operations. David challenges us to reframe our thinking on flexibility, not as a goal in itself but as a critical lens for examining what we confront every day: "the barriers to traditional education." Adrian knows well the win-lose dynamics at play during technology implementation and also the insidious impacts of "legacy thinking"—those ideas and policies that were useful to institutions in earlier times but that now impede thinking. He analyzes the current range of technology-enhanced learning methods after posing two initial questions: "To what extent does e-learning transform distance higher education into 'a more student-focused and flexible system'? What adjustments to the practices and behaviours of both learners and teachers might evolve through the increased use of technologies?" Alan's use of the term *sap* is deliberately provocative. He wants us to revisit claims that the world-renowned Open University in the UK is still opening educational doors and keeping them open for adults needing a second chance at education. Are these adults, he asks, being foolish or being fooled? Or is there a terrible irony here? In botanical life, sap is a valued nutrient for living plants and trees. But Alan does not use *sap* to refer to what institutions might offer as vital nutrition to sustain the lives of learners. Rather, it is "people who are offered the possibility of self-improvement yet who, it turns out, have relatively little chance of succeeding" who are the target of the university's "sap production" machinery, which is driven by the need for enrolments. But who ultimately benefits in this process?

# 20 › The Paradoxes of Flexible Learning

DAVID HARRIS

The term *flexible* is itself used pretty flexibly, at least in the UK. It does not seem to refer precisely to any particular kind of educational system but acquires its meaning only from its location in particular discourses. Those discourses often criticize particular aspects of existing educational systems as being "inflexible" and introduce new alternatives that are allegedly more flexible in comparison. Skeptics like me are fully entitled, I believe, to feel suspicious. Discourses are used to engage in political struggles of various kinds between contending parties who are trying to explain, justify, and rationalize their particular positions. Among the contending groups, we find patterns of variable enthusiasm for both flexible and inflexible practices.

In what follows, I will examine and analyze the paradoxes that accompany flexibility in higher education and that are responsible for uneven uptake and variable practices. Specifically, I'll explore key factors and behaviours such as student flexibility, student "aesthetics," and the managerial turn in academic life, all of which produce paradoxes that undermine flexibility. Actor-network theory, used in my analysis, provides one conceptual frame to explain these paradoxes and contradictions, one that can be useful to those wishing to uncover paradoxes and contradictions in their own contexts. One implication of the overall analysis is that intervention by practitioners is essential to clarify and manage the paradoxes in order to achieve maximum flexibility in higher education.

## FLEXIBLE STUDENTS

As the system shifted from an elite to a mass clientele, "non-traditional" students seemed to offer particular problems, with contradictory results. One solution involved "active teaching," the purpose of which was to

ensure that the audience was given a chance to interact with the teaching material. Any move toward a learner-centred environment was limited by the development of particular approaches to "study skills" demanding greater student conformity (Harris 1994).

Simple conformity was itself initially challenged by research on learning styles. Sadler-Smith and Smith's (2004) comprehensive account of recent work, particularly relevant to flexible learning, yields an impressive list of different models and approaches. However, another paradox soon presents itself: there is so much variation in student learning styles that even flexible-learning systems, as currently implemented, are not capable of accommodating them. Visual learners might be better involved with some minor adjustments, and flexible-learning systems might be tweaked to permit both holists and analysts to follow their preferences, but Sadler-Smith and Smith eventually realize that it might be better, after all, to restrict the available styles. They call for "the reduction of individual differences (through strategy development) rather than for their differential accommodation" (2004, 406).

This rather uneasy combination of flexibility and training appears in a number of other commentaries. Hill (2006, 189), for example, begins by arguing that "providing flexibility in terms of what is learned and who decides what is learned is a primary tenet of constructivist learning" (and everyone knows that constructivist learning is an excellent thing). Yet not all learners will be entirely comfortable with such responsibility. As a result, they may have to be (fairly inflexibly) trained into deciding what they want to learn. The article proceeds from offering "support mechanisms in order to help the learner become comfortable with the flexible setting" (190) through to a fairly conventional set of the usual admonitions to students to be disciplined and well organized, more or less as in many standard study-skills packages—"Be Willing and Able to Commit Time to the Course" (193).

## SOCIAL LIMITS TO FLEXIBILITY

However, students also bring with them what Bourdieu (1986) has called sets of tastes or "aesthetics." In particular, the "popular aesthetic"—with its emphasis on immediate identification, emotional involvement, and bodily pleasures—almost inevitably contradicts the unconscious

aesthetic of higher education, with its opposite values—detachment and calm, unemotional discussion. We see the unconscious aesthetic at work in Bourdieu (1988), where teachers in an elite French educational institution fleshed out and operationalized formal assessment criteria with a number of unconsciously held social and cultural judgments about their students that involved such matters as style, accent, and even non-verbal language—criteria relating to how students stand, control their bodies, regulate distance between themselves and tutors, and so on.

The important issue of the impact of flexible learning on social mobility or social exclusion has been addressed by Selwyn, Gorard, and Williams (2001). They focus on certain social factors governing access to information technology (IT), which led to a considerable unevenness in access and uptake, at least in the United States. Thus, "the stark delineation between those who currently have access to IT and those who do not, in terms of age, socioeconomic status, race, and gender, has led to growing concern over an emerging 'digital divide'" (260). This divide is produced partly by a simple matter of expense but also by what might be called tastes. Factors affecting the likelihood of participation can be conveniently classified as "situational (to do with lifestyle), institutional (related to the opportunities available), and dispositional (personal knowledge and motivation). . . . What IT cannot do by itself is to change the dispositional constraints or alter the social determinants of participation" (264).

Selwyn, Gorard, and Williams go on to point out that "there is growing evidence of a relatively stable learning identity for lifelong learners formed by school-leaving age and stemming from family background, initial educational experiences, and informal episodes" (265). Furthermore, underlying values in IT point toward the groups that always benefit: "information and communication technologies are ostensibly White, middle-class, Eurocentric, male artifacts in terms of their language (predominantly English), technical development, and users' values" (267).

## ACADEMIC WORK AND MANAGERIALISM

A new inflexibility elsewhere affects academic work; it is associated with the "managerial turn," the increasing regulation of standards, course

design, and assessment through various "quality" agencies (see Harris 2006). Anyone working in contemporary UK higher education can provide many examples of the arbitrary rules introduced by "quality" mechanisms. My personal favourites turn on issues such as the awarding of extenuating circumstances for the late submission of student work. The first stage was to make this a matter for quality management and to take it away from the discretion of tutors. The next stage was to regularize the situation, with a list of acceptable and unacceptable extenuating circumstances. All was well as long as it was a matter of a sports injury or sudden illness, the default cases. However, students might also report being adversely affected by bereavement. The response was to attempt to define categories of bereavement. Would students be legitimately affected only by the bereavement of a close relative? What would be meant by a close relative? What about honorary relatives? What about beloved pet animals? Many a quality committee has spent hours discussing these questions, often resulting in a truly substantial document listing acceptable and unacceptable extenuating circumstances and requiring a substantial clerical effort to manage. Ironically, in my case, the inevitable ambiguities remaining were solved only by subjective judgments made by a tutor and offered as "evidence."

There are many other examples. I have been amused to see Bloom's taxonomy of educational objectives reborn and rendered as a mere list of verbs that must be used in writing learning outcomes—not actually used to guide course design, that is, but deployed instead to meet standard requirements for a well-formed declared learning outcome. (For a schematic guide to the new Bloom, see Overbaugh and Schultz n.d.) Course proposers have run into serious difficulties by not using such lists of approved words. In one case, the learning outcome expressed the hope (for, despite their objective appearance, that is what outcomes express) that students might develop critical insight into the material they were being taught. This caused problems because "critical insight" was not accepted in learning outcomes until the third level of undergraduate study, allegedly as Bloom had suggested. Flexible learning seems to be curiously compatible with these authoritarian trends.

Hill (2006) complements her stern advice to students with mirror-image advice for staff, who should make themselves available, get committed,

check their electronic materials frequently, and so on. Kirkpatrick (2001, 174) writes that despite her best efforts, backed with some managerial clout, "a larger proportion of staff were yet to demonstrate an interest in the capacities of new technologies." She ruefully notes that "the introduction of flexible learning through information technologies is accompanied by serious challenges to the identity of academics, the construction of the notion of teaching and learning, and places strong demands on the culture and expectation of academic practice and higher education" (175).

## ACTOR-NETWORK THEORY

Actor-network theory (ANT) offers one approach to explaining these paradoxes and apparent contradictions. (For a useful list of resources, see Ryder n.d.) The networks to be analyzed include as active agents both machinery and collective agents, since these play a crucial part in effective operations.

One example would be to analyze the well-known problem of moving from laboratory-based studies to field-based studies. In the case of some important early work at the UK Open University, for example, an excellent system of conversational learning was developed in the laboratories of Professor Gordon Pask (see Harris 1987). Pask illustrated how learners could be granted a great deal more autonomy to explore whole networks of concepts, and how tutors, including pieces of intelligent software, could guide explorations, test the acquisition of knowledge, and even prompt learners into making innovative discoveries. The whole experiment assumed that networks of concepts could be conveniently delimited. The main problem, though, lay in moving from laboratory experiments involving volunteer psychology undergraduates to a mass teaching system working at a distance and, crucially, insisting that participants be graded and credentialized. In those circumstances, there is a strong trend toward strategic orientations, students pursuing the best possible grade by following the most direct and obvious route. Even a conversational stance can be "technified" (Entwistle 2000) and thus simulated: even reflective logs can be strategic, especially where students feel that they have been "forced to reflect" (Hobbs 2007) by assessment requirements.

Advocates of conversational learning simply did not realize that the modern university is also integrated into other networks. It is linked to political and economic agents and offers not just effective teaching and learning but also the efficient regulation and credentializing of people. It is highly misleading to insist that these functions are absent or secondary and can be ignored in discussions of assessment techniques designed to promote more flexible learning. The need to credentialize remains marginal to those working in the design region of the network.

Double functioning is often represented in the hierarchical arrangement of assessment bodies. At the lowest level, tutors might assess students as best they can on the basis of their perceived abilities and talents, officially at least. However, once those assessments are represented as grades on a spreadsheet, they become more abstract data and are exported into more rarefied assemblies of managers and senior academics operating in other regions, who have different agendas. Sometimes, those agendas include being responsible for producing an agreed-upon distribution of grades or making a particular institution's grades comparable to those of others. The original participants are powerless to stop this and sometimes a fatalistic acceptance steals over the most idealistic academic who finds it simply too much effort to take on the massive objectivity of the examination process at the higher levels, with its notion of the expected distribution.

## FLEXIBLE LEARNING AND STUDENT IDENTITIES

Edwards and Clarke (2002) also developed an analysis based on ANT, but with some implications for student identity. In modular degrees with flexible routes, for example, students are not enclosed within traditional disciplinary regimes. The good side is that they are not as subject to the power relations of what Bernstein (1971) once called strongly framed and strongly classified forms of knowledge. However, this means that they do not develop strong subject identities either. This is exacerbated when flexible learning includes items like work-based learning modules, where socializing power passes over to other providers like employers. Edwards and Clarke (2002, 156) argue that flexible learning offers students a kind of

competitive individualism, "a supermarket for self-managing individual lifelong learners to pass through, collecting the resources they need to develop themselves in a society of control." Leaving aside these rather sinister general implications, Edwards and Clarke also note that this kind of individualism can be stressful and unwanted: it offers a kind of limbo that can positively deter a hesitating student. Referring to their study of adult students contemplating entering further education, they suggest that "place, closure and constraint would therefore seem to have a positive value for many of the interviewees" (164).

## FLEXIBLE LEARNING AS THE ONLY OPTION IN THE FUTURE

For the enthusiasts, flexible learning appears to be both desirable and inevitable, despite the sorts of problems I have raised. For some supporters, substantial social or economic changes allow flexible learning to emerge as the only available technical fix. The changes cited range from postmodern cultural relativism to predictions of an inevitable knowledge economy.

Postmodernism has already been criticized as an ideology rather than an inevitable future for all of us (Bourdieu 1986; Jameson 1991). The idea of the knowledge economy is also finally coming under criticism, not least in the form of a powerful analysis of actual employer practices by Brown and Lauder (2006). Their main criticism turns on the educational implications that are commonly drawn, especially in the advanced economies. There, people are increasingly urged to develop skill through higher education and lifelong learning, which the enthusiasts assume means support for flexible learning. However, Brown and Lauder note that for global companies, the cost of skilled labour is also crucial and that this cost is considerably lower in places like India and China. The supply of skilled labour from those countries is also increasing substantially. In those circumstances, it looks as if the part played in the global economy by UK and US graduates is likely to be diminished. Already, the economic return of a university degree is falling, and the availability of graduate jobs is decreasing. It will not be long, Brown

and Lauder suggest, before this becomes apparent to would-be students, and there will be precious little incentive to engage in lifelong learning of this kind.

To push the point to its furthest, flexible learning could turn out to be far from the inevitable future form and could appear instead as a characteristic variant of education in the last great economic boom for Western economies.

## CONCLUSION

Clearly, flexible learning encompasses as many paradoxes and contradictions as conventional learning. It is important to avoid seeing flexible learning as some panacea and to view it instead as an ambiguous development, one that requires intervention to develop the "good" sides and avoid the "bad." The provision of interactive technology alone will not solve the existing problems posed by the social, cultural, and professional barriers to participation on the part of both students and staff. The most passionate advocates of flexible learning do seem to recognize this, in a way. Much recent literature starts with a list of benefits that will accrue to staff and students but then moves rapidly on to note considerable reluctance and resistance to becoming involved. Instead of recognizing resistance as an effect of the complex and contradictory demands from whole networks in which real teaching and learning is embedded, advocates hope that a training program will overcome the problems.

It is quite possible that students and staff could be trained to overcome some of the barriers, but it's unlikely that all of them will disappear—and the cost and effort of training could be considerable. It might be more effective instead to put effort into diminishing the barriers to traditional education. Given the challenges to traditional notions of student identity and the way in which some people might see the result as excessively risky and isolating, it is worth asking how flexible education stacks up against the benefits of traditional education, especially as Tattersall et al. (2006, 391) remind us that "flexibility goes hand-in-hand with procrastination and non-completion."

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## ABOUT THE AUTHOR

David Harris was lucky enough to go to the London School of Economics at the height of the student revolts in the late 1960s, where he saw professors stripped of their charisma in front of his very eyes. After teacher training, his first proper job was as a research assistant at the UK Open University in 1970: it was a very marginal and endangered organization then. Decades of working face to face at a small college ensued: here he tried to explain to skeptical colleagues that the “new technology” might actually be used in teaching and learning. Visits to Australia to see "mixed-mode" approaches proved inspiring and sustaining. His personal website continues to receive a steady flow of visits, in the hundreds per day, with substantial peaks, curiously just before assessment deadlines. www.arasite.org/ncv2.htm

# 21 › Transformational Technologies *Exploring Myths and Realities*

ADRIAN KIRKWOOD

I focus here on the potential and limitations of flexibility in technology-rich distance education. Flexibility is one of the fundamental advantages that distance education offers over traditional classroom-based higher education. Many students who choose to study "at a distance" are already employed, or their circumstances make it impossible for them to contemplate full-time education, even if they possess the necessary entry qualifications. The UK Open University, the first of the multiple-media distance-teaching universities, proudly proclaims in its mission statement that it is "open to people, places, methods and ideas" (www.open.ac.uk). Most single-mode distance-teaching universities recruit students who need to fit their studies around other responsibilities and demands. They must be able to determine for themselves where and when they undertake their learning activities (within the overall course and assessment schedule) and the pace at which their studies progress.

In recent years, many campus-based universities in Western countries have sought to increase the number of non-traditional students enrolled by offering a growing range of e-learning or technology-enhanced learning (TEL) opportunities. These developments may also serve to increase flexibility for on-campus students. For example, the current "Strategy for E-learning" of the Higher Education Funding Council for England takes a technology-led approach designed to "support the HE sector as it moves towards embedding e-learning appropriately, using technology to transform higher education into a more student-focused and flexible system, as part of lifelong learning for all who can benefit" (Higher Education Funding Council for England 2005, 5).

So here I critically examine the implications for flexibility of the increasing adoption of e-learning or TEL methods in distance education. To what extent does e-learning transform distance higher education into "a more student-focused and flexible system"? What adjustments to the practices and behaviours of both learners and teachers might evolve through the increased use of technologies? Also, and more importantly, I consider the potential significance of conceptions and models of learning and teaching.

One very noticeable increase in flexibility relates to the use of terms when technology and education collide. The particular term used in any particular case often seems to be determined more by fashion than by any meaningful definition of the constituent words themselves. For example, over the last fifteen to twenty years, the application of information and communication technologies (ICT) to learning and teaching has been called *computer-assisted learning, distributed learning, e-learning, networked learning, online learning, tele-learning*, and *technology-enhanced learning*. Each of these terms tends to be applied in a fairly imprecise way to describe a diverse range of educational activities. Although the word *learning* has usually been an essential part of the term used, in practice the focus has more often been on supporting teaching with technologies.

## IMPLICATIONS OF TECHNOLOGY-ENHANCED LEARNING FOR LEARNERS

When any significant change is introduced into an educational system, there are likely to be winners and losers. While some students (or potential students) are likely to derive advantages from any particular change, other people will be disadvantaged. Ideally, the overall total gains should more than compensate for the sum of the losses incurred. In higher education, therefore, we need to examine the expectation that technology-enhanced learning in the form of online/Web-based work should form an increasing proportion of student activity. What is gained and what is lost? Who are the winners and the losers? I will also assess how several aspects of increased online activity associated with Web-intensive modules or courses may impact flexibility.

*Internet Access*

Course modules that are exclusively online or that include a substantial amount of online work severely restrict opportunities for learners to study where and when they choose. Some learners might be able to log on to their course website from many parts of the world, so there is the potential for global course registrations and greater flexibility for those students who travel extensively. On the other hand, dependency on a high-grade Internet connection reduces or rules out access for many learners. Due to cost or personal circumstances, students might have no Internet access, or they may study in a locality that is not well served by the Internet. Many learners may be unable to access the Internet at a preferred time: for example, while commuting between home and work.

*Interpersonal Communication*

Online communication—particularly the opportunities for interpersonal contact between learners—signalled the move, in many institutions, from "second-generation" to "third-generation" distance education (Nipper 1989) and helped to overcome what Guri-Rosenblit (2005, 475) called "the Achilles heel of distance education." However, many reports lament the fact that students tend to make much less use of interpersonal communication such as online student forums or conferences than their teachers had anticipated (Erlich, Erlich-Philip, and Gal-Ezer 2005; Fung 2004; Kear 2004). Kirkwood and Price (2006) argue that this often results from poor pedagogic design due to the persistence of inappropriate models of learning and teaching. A highly didactic or transmissive approach provides little incentive for students to learn through discussion or collaboration with peers, especially if such activities do not contribute to the learning outcomes being assessed. If students expect didactic teaching and do not understand why discussion with fellow learners might bring benefits, they are likely to consider communication with peers to be a waste of their time and effort. Opportunities to learn with and from fellow students in the social context of a course cohort may easily be thwarted by resolutely individualistic approaches to pedagogy and assessment.

*Synchronous or Asynchronous Contact*

While asynchronous communication offers many advantages for distance learners, there are pressures to increase the use of synchronous

communication tools, particularly when language development (Hampel and Hauck 2004) and/or group work are important outcomes. It is claimed that the development of online communities of learners can be encouraged and reinforced by offering real-time "group events'" (Weller 2007). However, this strategy may act as another means to diminish learners' flexibility in the time, place, and pace of study. Such a demand for synchronous discussion is particularly problematic for modules or courses offered internationally, where students might be dispersed geographically across numerous time zones.

Increased opportunities for student-to-student communication have enabled distance-education courses to adopt social-constructivist approaches (Duffy and Orrill 2003; Kanuka and Anderson 1999) to a greater extent than was previously possible. Activities that require cooperation, collaboration, and learning from and with peers need no longer be confined to infrequent sessions when students can be physically colocated; group work can now be undertaken online at any appropriate time. There is greater flexibility in course design and improved possibilities for widely dispersed learners to engage with group-work activities. However, a successful collaborative group—particularly if it requires a sustained or substantial amount of social interaction and/or construction of knowledge—requires learners to progress more or less at the same pace (lock-step) and to remain in frequent contact with other members of their group. Again, this imposed cohesiveness restricts opportunities for learners to progress with their studies in ways that best suit their own circumstances and schedule. Teachers may intend to increase the student-focused nature of learning activities, but in practice, learner flexibility is likely to suffer unless teachers fully consider the implications for learners when designing and scheduling collaborative group work.

*Effects of E-assessment*

One set of functions that computers have offered in educational contexts for many years involves testing and the provision of feedback to learners almost immediately. Computer-based tests and quizzes have been used extensively in situations where factual recall is being assessed and, to a lesser extent, where more complex responses are demanded: for example, relationships between concepts or factors, evaluative judgments, and so

on. In distance education, the rapid provision of appropriate feedback on Web-based formative assessments can have advantages for both motivation and the development of learning. Of course, the extent to which learners will actually derive benefit from feedback depends on how well that feedback has been prepared and presented.

However, too many multiple-choice tests and quizzes used in a module or course brings the danger of encouraging surface rather than deep approaches to learning (Marton and Säljö 2005). We now have considerable evidence to support the view that assessment is the main driver for student learning, particularly in distance education (Kirkwood and Price 2008). Assessment influences not only which components of a course or module students choose to give their time and attention to but also how they attend to those components. Empirical studies (e.g., Scouller 1998) have found that students tend to adopt different learning approaches or strategies in different situations, according to their perceptions of the assessment requirements. A surface approach to learning is more likely if students anticipate assessment that requires little more than knowledge-based factual recall: for example, a quiz, multiple-choice questions, or a short-answer examination.

*Forms of E-assessment*

The online submission of summative assignments is another innovation bringing potential advantages for learners. Assignments in digital form can be uploaded to a university's system right up to the cut-off point, so that students do not have to print and mail their completed assignments well in advance. However, while online submission is highly suitable for essay-type assignments, it does not favour forms and formats that are not as easy to handle electronically. Where symbols, equations, and diagrams are necessary in student-generated demonstrations of learning—as is typically the case in subjects such as science, mathematics, and technology—students wishing to submit their work online face certain difficulties. Sometimes, students' coursework includes non-written evidence or artefacts—for example, drawings, photographs, audio or video clips, or complex multi-media creations. These, too, may be highly problematic if there are restrictions on the size of files that can be handled by the online assessment system.

*Weighing Advantages and Disadvantages*

Without doubt, technology-enhanced learning can offer learners many advantages. Many individuals would be unable to pursue their studies or their particular choice of course if online modules were not available. However, as I have outlined, technology-led innovations and/or increased dependency on online working have acted to restrict or disadvantage many learners.

## IMPLICATIONS OF TECHNOLOGY-ENHANCED LEARNING FOR TEACHERS

In recent decades, considerable transformation in the education sector and in wider society has produced impacts upon the higher-education environment. Kirkwood and Price (2006) drew attention to the need to adapt to the following key changes:

- Changing characteristics and circumstances of students
- New demands in terms of the knowledge, skills, and competencies expected of those gaining certification from courses
- Greater diversity in relationships between learners and the providers or sources of learning opportunities
- Expanding participation in the "networked society" with its increased opportunities for interpersonal communication and access to digital resources

Higher-education institutions and their teachers need to develop different ways of working. They are, indeed, responding to some or many of these changes in various ways. However, what is really required is a holistic reappraisal of the complexities of learning and teaching within a markedly different social and economic landscape. Piecemeal measures are unlikely to adequately achieve the required complex and multifaceted adaptations. Attempts to increase flexibility in one aspect of an institution's practices may, in fact, be undermined by "legacy" assumptions, models, and policies that have shaped and supported the institution in former times and circumstances. Let us dig a little deeper here.

Most single-mode distance-education universities were designed to benefit from economies of scale achieved by applying the "industrial model" (Peters 1983). The preparation of educational materials is separated—by time and place—from the interaction of students with those materials and with their tutor. To a large extent, this approach still underpins the development and production processes for materials and resources in single-mode distance universities. In essence, the industrial model gives preference to the one-way flow of information and ideas—from experts/teachers to learners—with only limited opportunities for dialogue. Because learners are dispersed and separated from their teachers and from each other, the industrial model reinforces the role of institutions and academics as "gatekeepers" who control access to information and knowledge.

This model predated the era of the Internet and the World Wide Web, which make learner-learner, learner-teacher, and learner-resource communications considerably easier to achieve and much more difficult to control. Reducing "transactional distance" (Moore 1993) also increases the complexity of the role of teachers within the learning process. The multiple forms of communication now available for distance education challenge the assumptions underlying systems and procedures that were created for the distribution of learning resources from those who possess knowledge and understanding to those who do not. The industrial model was served well by transmissive media, in forms that enabled mass production, storage, and distribution of materials for multiple presentations: that is, print, broadcast, and disc or cassette. It also concentrated on creating and delivering self-contained educational resources to individual learners, providing everything they needed to successfully complete their studies. In an increasingly networked society, it seems appropriate to question the continued dominance of such an individualistic educational model.

*Structural Inertia*

Despite the fact that distance education institutions are increasingly introducing e-learning or technology-enhanced learning approaches, there remain many "legacy" production and administrative systems that continue to favour the mass production of materials for distribution for

individual study. These structural factors may significantly hinder the adoption of more flexible approaches. The distinction, for example, between those who develop distance-education modules and courses, and those who tutor students is becoming difficult to sustain with the increasing adoption of online working. Global networking has brought about an information explosion and an increasingly rapid dissemination of new ideas, models, and ways of understanding, with the result that course modules can no longer be produced to remain largely unchanged for several presentations. Regular updating of modules brings budgetary and staff workload implications that make economies of scale more difficult to achieve. Regular updating and increased opportunities for interpersonal communication also challenges the separation of roles and the patterns of working associated with the industrial model, muddying a clear distinction and separation between those responsible for planning and producing course resources and those who interact with students during course presentation.

*Assessment Practices and Procedures*

Student assessment in distance education is an important area, but it is progressively becoming "unfit for purpose." Graduates are increasingly expected to develop a range of skills that prepare them for living and working in the twenty-first century. These skills include generalizable attributes such as the ability to cope with complexity, proficiency in information retrieval and evaluation, presentation skills, and the ability to influence others and to work as a member of a team. (For an example of "graduate qualities," see www.unisa.edu.au/gradquals/default.asp.) However, the commonly used methods and approaches for assessing students rarely enable these skills to be adequately demonstrated. Administrative rules and procedures often hinder teachers' attempts to make assessment more appropriate. For example, the assessment regulations often remain focused on the individual learner and allow only the work of a single person in any assignment to be assessed. If the development of group-work skills needs to be assessed, students must indicate their own contributions to any jointly produced outcomes and/or must write a commentary on the processes involved. Increasingly, we encourage students to reflect upon their learning and their personal and/or professional development. Various online tools have been developed to facilitate the reflective process: learning journals,

e-portfolios, and so on. However, regulations may obstruct this process if students are not permitted to submit any item for assessment more than once: this rule makes it difficult for individuals to show precisely how their learning or practice has evolved over their program of studies.

*Re-versioning Resources*

One way to employ technology to increase flexibility is to reuse or re-version course resources, creating "learning objects" for use in various contexts or institutions (e.g., Weller 2004; Littlejohn 2003). Sometimes the emphasis is not on reusing content "objects" in a variety of situations but on developing generic pedagogic approaches or learning designs for application in different disciplines and with disparate types of learner (e.g., Laurillard and McAndrew 2003). Both approaches have been developed not by subject specialists but by people engaged in applying technology to learning. Many instances of these approaches are evident, but they certainly have not brought about substantial changes in the practice of most higher-education teachers.

Let us examine some of the problems here. The "learning objects" approach to increasing reuse and flexibility tends to be interpreted as embracing a fragmented didactic/transmissive model of learning and teaching: it is about delivering component bits of knowledge to learners in a decontextualized manner. How, then, are opportunities given for learners to derive meaning from each new learning object by relating it to their existing knowledge and ways of thinking? How do learners establish the contexts or circumstances within which the object builds their understanding? If learning objects represent content without a specific pedagogic approach, is it realistic to assume that learners in any cohort will achieve similar assessable learning outcomes? How will the learning of individuals be scaffolded? If a generic pedagogic approach is to be reused, might this create dissonance with the existing beliefs and practices of many teachers? The potential for flexibility through reuse and re-versioning might actually prove to be anything but flexible in many regular learning and teaching situations.

Finally, the manner in which technological innovations have been introduced and "embedded" within higher-education institutions has not been an unqualified success! Too often, technologies have simply supplemented and/or reinforced existing teaching practices. Policies

and strategies for e-learning or technology-enhanced learning in both distance and campus-based universities have tended to be technology driven. They have concentrated on developing the technological infrastructure with little or no consideration being given to the implications for appropriate pedagogies and student learning.

Technology-driven policies for ICT adoption reflected in professional development programs for academic staff (full-time and part-time) have tended to flow from the top down. Kirkwood and Price (2006) argue that such programs will never have more than limited success because they fail to address underlying and often idiosyncratic issues relating to the nature of teaching, learning, and pedagogy. Unless teachers are encouraged to re-examine their own beliefs and practices in the light of these essential foundations, technology will never do more than reproduce their existing approaches to learning and teaching, no matter how appropriate or inappropriate these might be.

## CONCLUSION

I have examined some of the myths and realities associated with greater use of ICT for learning, teaching, and administration in higher and distance education. I have suggested to you that increased flexibility in certain aspects of the educational process might be counterbalanced by decreased flexibility in other aspects. I have argued that the adoption of technology is very unlikely *in itself* to result in greater flexibility for learners and/or for teachers. Ongoing debates about the potential for technologies to transform educational institutions can divert attention away from the pervasive structural and systemic constraints and imperatives that determine or limit many aspects of educational practice.

I therefore ask you to consider the following questions in relation to your own context and experience as we all distinguish between myths and realities:

- How has your institution adopted technology-enhanced learning and what have been the main drivers (e.g., widening access, increased enrolments, etc.)?

- How much is known about the implications of adopting technology-enhanced learning for your existing or potential students? How much differentiation is there between students in terms of subject areas or levels of study?
- What types of support are provided to encourage or enable teachers to adapt their teaching and assessment practices in response to greater use of technologies? What has been your own experience?
- How well do the models of teaching and learning implicit (or explicit) within your organization relate to the current emphasis on learning-centred approaches and increased flexibility? What contradictions or incongruities (if any) does the nature of this relationship expose in your own teaching practices?

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## ABOUT THE AUTHOR

Adrian Kirkwood's determination to enter higher education grew in inverse proportion to the support he received from his school and, in particular, from its head teacher. Being a member of the first generation of his family to enter post-secondary education, he has always enthusiastically backed increased opportunities for non-traditional students to benefit from higher education. While at the UK Open University, he has been primarily concerned with improving the learning experience of students, especially in relation to the use of media and technologies. He has often described himself as a "skeptical enthusiast." Rather than being led by technologically deterministic fashions, Adrian's involvement with numerous evaluation and research studies has enabled him to take an evidence-based approach to helping others make effective use of technologies for learning and teaching. Adrian is currently Senior Lecturer in the Open University's Institute of Educational Technology. http://iet.open.ac.uk/people/a.t.kirkwood

# 22 › "Plenty of Saps"

ALAN WOODLEY

In 1957, a fire at the Windscale nuclear power plant in the UK released a large amount of radiation into the atmosphere. In an effort to create a new, clean image, the plant was renamed Sellafield in 1981. Something similar took place in Vancouver the following year, when the International Council for Correspondence Education (ICCE) became the International Council for Distance Education (ICDE). Although the arguments for changing the name included the view that the phrase *correspondence education* did not do justice to the new multi-media approaches that were being introduced at that time, it was also the case that the phrase "had unfortunate associations with dubious courses advertised on packets of matches" (Daniel 2007).

Well, *distance learning* has been succeeded by *open learning*, *open and distance learning*, *supported open learning*, *flexible learning*, *blended learning*, *e-learning*, *mobile learning*, and so on. But call it what you will, we all know deep down that we are talking second-best. *Real* education is about sitting in a comfy chair with a glass of sherry in dialogue with your personal tutor. If things get really tough, then you might have to share the experience with others in a lecture theatre, but that is as far as it goes. Anything else is "learning at the back door" (Wedemeyer 1981).

Wedemeyer began his seminal work on the subject by arguing that Jonathan Swift, in his early satire *A Tale of a Tub*, anticipated today's worldwide yearning for learning: "For to enter the palace of Learning at the Great Gate, requires an expense of time and forms; therefore men of much haste and little ceremony are content to get in by the back door" (quoted in Wedemeyer 1981, 18). The "back door" approach that Swift referred to was the quick method of becoming a scholar "without the fatigue of reading or of thinking"—something that was achieved by dropping book titles

into the conversation and by merely studying a book's index (see Swift 1704, section VII).

Swiftian back doors still exist today. You can buy bogus qualifications from institutions that exist only in name, for example. However, the back door that I see, as did Wedemeyer, is the very opposite of Swift's. It is the second-chance, and arguably second-rate, "tradesman's" entrance for people who have not had easy or privileged "front door" access to education. It requires an enormous investment of time and the filling out of numerous forms, and can be very costly. It can have very low chances of success and doesn't necessarily lead to personal or economic gains.

My task now is to take a second (and rather contrarian) look at what is happening in one arena of (allegedly) flexible practice, the UK Open University (OU; www.open.ac.uk). I'll cover some origins, ask why adults take part-time studies, look at opening iron triangles, and then ask what happened when iron met high tech. In short, what is the evidence today for greater flexibility at the OU? Is the back door really open? And what may be next for the OU? Three decades at the OU have conditioned my thinking.

## EARLY DAYS

The basic methodological framework of open distance learning (ODL) can be traced back at least to the first century and St. Paul's epistles (Daniel, West, and Mackintosh 2006). Paul used the technologies of "calligraphy" (writing), "despatch carriers" (post persons), and "oral exposition" (speech), in that order, to spread the ideas of Christianity to new churches. Sadly, no evaluation data in the shape of feedback forms, learner portfolios, drop-out questionnaires, and so on, survive from this period. However, if we take the subsequent spread of Christianity as our outcome measure, then this could indeed be "the most successful and durable application of open and distance learning ever undertaken" (Daniel, West, and Mackintosh 2006).

So, after this initial triumph, where did it all go wrong? Let's leap forward over a thousand years to the true advent of "first-generation" distance education known as "The Correspondence Model" (Taylor 1995).

Holmberg (2005) notes an example in the *Boston Gazette* of 1728, where Caleb Phillips, a teacher of the new method of shorthand, was seeking students for lessons to be sent weekly. However, everybody agrees that things really kicked off in the nineteenth century, when distance education was made possible by the spread of cheap, efficient postal services and was made desirable by the Industrial Revolution's demand for trained workers. Private enterprise saw an opportunity for profit.

At the very least, I refer to organizations that made their profit like Colman's Mustard did (Colman's allegedly made money because people always put more mustard on their plate than they can eat). While the course material might be satisfactory and the accreditation legitimate, correspondence colleges got their fees from students in the full knowledge that most would drop out. Colleges would not have to pay staff to mark their work.

At the worst, we are talking about completely bogus institutions, such as the fictitious St. Ambrose's College, Oxford, in Graham Greene's (1970) short story "When Greek Meets Greek." The proprietor announces that "degree-diplomas will be granted at the end of three terms instead of the usual three years. . . . Nobody will ever fail" (146). When his daughter complains that it won't catch anybody but saps, he replies, "There are plenty of saps" (146). I had always assumed that by *sap*, Greene meant a foolish person who is easily tricked or cheated. However, my dictionary indicates another meaning: "a plodding student." Either way, they provide the customers for the flexible-learning trade.

Essentially, one is dealing with organizations that are self-interested and profit seeking, and the tool of their trade is part-time study. Let's face it, the term *part-time* is rarely used in a positive sense. Whereas *full-time* suggests complete dedication, 100 percent effort, 24/7, and so on, *part-time* smacks of half-heartedness and lack of commitment.

## WHY DO ADULTS TAKE PART-TIME STUDIES?

We should probably start with Confucius, who, in the words of one translator, said in the *Analects:* "It is not easy to find someone who is able to learn for even the space of three years without a thought given to official

salary" (Confucius, trans. Slingerland, 2003, 372). Apparently, Confucius was bemoaning the fact that people were studying only in order to get better jobs in the Chinese civil service. However, the ancient wisdom resonated well with the Robbins report in the UK (Committee on Higher Education 1963) and with Halsey, Heath, and Ridge's 1980 study of educational and social mobility: both reports quote it. My recent studies of OU students confirm that vocational reasons tend to predominate.

But why do some adults participate and not others? Hopper and Osborn (1975, 13) saw the education system "primarily in terms of society's attempt to solve the fundamental problems of social selection." This solution is attempted through "the deployment of the population at certain phases of the life cycle into those educational routes which will prepare them for, and lead them to, those segments of the labour market for which they have been judged most appropriate" (19). Hopper and Osborn argue that if the system is operating efficiently, then formal education is likely to stop with entry to the labour market.

The early intakes at the OU included many thousands of certificated teachers who had been "selected" to go to grammar schools, but then "rejected" since they had gone to teacher training colleges rather than universities. Through the introduction of credit transfer, the OU provided this group with a relatively quick route to both degree and promotion.

If you are in a meritocratic system and you are at the bottom of the status hierarchy, you may be able to accept that low position, but it's more comfortable to think that (a) you are better than that and (b) there is a way out of it. Distance education has, for many decades, provided one possible pathway to that dream. This is well illustrated in the iconic American novel *The Grapes of Wrath*, when a truck driver tells his hitchhiker: "Yeah! A guy got to get ahead. Why, I'm thinking of takin' one of them correspondence school courses. Mechanical engineering. It's easy. Just study a few easy lessons at home. I'm thinking of it. Then I won't drive no truck. Then I'll tell other guys to drive trucks" (Steinbeck 1940, 12). The truck driver is espousing the American dream: that through participation in the dominant society and culture of the United States, one is able to prosper. We never hear what becomes of the truck driver, but if those correspondence lessons turned out to be quite difficult or the expected pay-off was not forthcoming, he could be labelled a sap.

## BREAKING OPEN A TRIANGLE

Many have claimed that flexibility, under the name of distance education, began its current version with the opening of the OU in 1969. Let's look at what has happened there. To help our thinking, I'll use an easy evaluative tool—Daniel, West, and Mackintosh's notion of the "iron triangle," with its three criteria for educational systems: wide accessibility, good quality, and low cost.

> Our general point is that if you try to improve one side of this triangle your action usually changes the other two sides in undesirable ways. For this reason we refer to it as the iron triangle. It has been a straitjacket on the expansion of education throughout history.
>
> The revolutionary feature of educational technology in general—and of open and distance learning and ICTs in particular—is that it can break open the iron triangle. You can increase access, improve quality and cut costs—all at the same time. This is because of the economies of scale and consistency of quality that come with using media. (Daniel, West, and Mackintosh 2006)

So in its forty years of teaching, what has the OU achieved? What has happened to flexibility since 1969? While many tout the positives of this flexible form of education, there are also some negative aspects of distance education when we look at accessibility, quality, and costs.

*Wide Accessibility*

The OU has clearly brought opportunities to millions of learners, but which learners and what opportunities?

OU students tend to be reasonably qualified on entry. One-third already hold a previous higher qualification. Another third hold qualifications that would get them into a conventional university. Forty-five percent of the OU's first intake were teachers. Since then, there has been a decline in the enrolment of teachers but little increase among the lowest socio-economic groups.

Retention rates are low. The Higher Education Funding Council for England (2009) estimated the OU graduation rate to be 20 percent. They

note that this figure may be a little harsh, as many students never intended to study for a degree. However, the fact remains that only 40 percent of new students in a given year go on to take a course in the second year—and the progress rates are much worse among students whose previous educational qualifications were relatively weak.

*Good Quality*

Few would dispute the quality of OU teaching. The courses are developed over long time periods by highly qualified course teams and support staff: the process is often referred to as the Rolls Royce model of course production. The tutors who mark assignments, run local tutorials, deal with student problems, and so on are well regarded by the students. Course quality is reflected in the fact that the OU regularly wins out over conventional universities in the annual UK National Student Survey (www.hefce.ac.uk/learning/nss/).

However, high-quality teaching does not mean easy learning. To achieve appropriate standards, learners are expected to study fourteen hours a week for thirty-two weeks to pass an entry-level sixty-credit foundation course. The core of each course is the correspondence text written specifically for that course. Students spend almost all of their time reading these texts and completing assignments based on them. Television and radio programs are rarely used as essential teaching material and are broadcast at increasingly anti-social times. Face-to-face tutorials are voluntary, and many students prefer more time with their texts to the travel time and unknown benefits of a tutorial session.

*Low Cost*

In the early years, the OU stood outside the university funding system, receiving its money directly from government. Researchers calculated that the OU could produce graduates at a fraction of the cost of conventional universities. This expectation was disputed by other economists, but the argument has lapsed because the OU, like other universities, is now funded by the Higher Education Funding Councils. As such, it receives as much teaching support per full-time-equivalent student as any other institution. By this definition, it is not cheap.

Employer-paid tuition, benefiting both the student and the OU, happens for only one in seven students. Furthermore, around one in four new students does not have to pay fees because he or she is in receipt of "benefits" or has a very low income. For this latter group, the cost is low for the individual but high for the system because these students require more institutional support. (People in this group also drop out more.)

## WHEN IRON MEETS NEW TECHNOLOGIES

The OU is now totally committed to what Taylor (1995) termed "the flexible learning model," which involves computer-mediated communication and interactive multi-media. So we stand on the threshold of a new fourth generation of distance education—the e-generation, with all the tantalizing promises of Web 2.0, Web 3.0 . . . Web N.0! As Taylor (among others) points out, "it is crucial to realise that the use of a range of instructional media does not automatically enhance the quality of teaching and learning" (3). Nor do media necessarily increase access or reduce costs (Bates 2005). So let me run my contrarian eye over today's happenings.

First, let us consider the justification for even moving in this direction. Will Swann (2007), the OU's director of students, argues that moving to more and higher media is a *necessity* for students: "No-one can credibly graduate now without the skills to access, filter and contribute to the global database of knowledge and networks. If ICT is a condition for economic success, then it must be an entitlement for students." Allied to that argument is the view that the university must move with the times. It is assumed that nobody, and especially young "screenagers," would be attracted to a university that is not using the latest hi-tech media. Others hope that the addition of new media will lead to improvements in teaching and learning. Certainly technologies have long been promoted as the way forward in education, even as "disruptive" influences (Sharples 2002), because they seem to offer the potential for pedagogic innovation or a catalyst for change. Such assumptions are reflected in the rhetoric associated with e-learning policy directives internationally, but others argue that they are not reflected in actual changes in practice (Conole 2007).

What is the evidence for greater flexibility? Is the pursuit of flexible education merely a cynical attempt to reduce teaching costs? And what impact does flexibility have on our efforts to break open that iron triangle of accessibility, quality, and cost?

*Wide Accessibility*

On the face of it, e-learning makes courses available globally, but one has to consider the digital divide: the differences between those with and without access to current technologies. Even in a prosperous country such as the UK, barely half of all households have broadband access. In 2007, of households with incomes in the lowest 10 percent, only 17 percent had an Internet connection (Swann 2007). As Johnson, Macdonald, and Brabazon (2008) suggest, digitization in tertiary education is reinforcing what advanced education has always been, throughout its history—a haven for the wealthy and the advantaged. My observational research, however, suggests that almost everybody in the UK has a letterbox.

*Good Quality*

Is e-learning delivering high-quality learning? Eisenstadt (2007), an OU pioneer of e-learning, found himself condemning it: "I was objecting to decades of false promises and research that had high intellectual merit but had either failed to deliver in the real world, or alternatively delivered, but made for an awful experience." As Eisenstadt saw it, most e-learning had people sitting in front of a computer screen while studying some content, which he considered a pretty awful way to learn. He felt that a promising way forward was provided by open educational resources and social software. Indeed, the terms Web 2.0 and e-learning 2.0 have become synonymous with a more interactive, peer-generated, and collaborative Internet. Many argue (e.g., Anderson 2009) that the new tools are resulting in a fundamental shift in the way students learn, consume, and produce new artifacts.

And, indeed, new OU courses now come replete with forums, blogs, wikis, and so on, to stimulate reflection, collaboration, communities of practice, and the creation and ownership of content. Eisenstadt worries about whether this cognitive/constructivist learner-centric paradigm will be accepted by the performance- and metrics-driven educational system.

Personally, I worry more about whether it will be accepted by the time-poor mature students who want to be told what they need to know in order to pass the course with minimum time and effort. Early data suggest that at least retention rates for online courses are similar to those for other courses.

In a recent blog, Frederick Toates (2009), a psychology professor at the OU, urges caution about going digital and questions the quality of e-learning in a more human-oriented way. He grieves for the potential loss of the book. Eschewing its more often-mentioned qualities, such as its transportability, its lack of batteries, its ability to store pencilled notes, its availability after the course has finished, and so on, he goes for its iconic status: "Many students find that there is something very special about holding a book in their hands and the physical characteristics of the book form a strong association with its contents." He also calls attention to an increasing ergonomic and physiological problem: "As more and more work places involve people sitting much of the day in front of a screen, I have serious reservations about the wisdom of them spending their studying time also in front of a screen."

Toates argues for real (as in contiguous and synchronous), as opposed to virtual, human contact: "The value of human contact should not be underestimated. This is why people travel large distances and at considerable cost to visit relatives and friends, when they could so much more easily be contacted through email or Skype." He might also have mentioned the dizzying effect on new learners when they are suddenly faced with instant online access to the world's knowledge and research (and must therefore contemplate the possibilities and costs of plagiarism).

*Low Cost*

Costing distance education is a notoriously complex task. I asked Sir John Daniel in 1998 why there had been so little research into the costs of online distance learning. Was it because it was so difficult or because people did not like the answers? His answer was "Both!" I asked Dr. Greville Rumble, a world expert in the costs of ODL, whether ODL was cheap. "It depends," he answered. However, it seems to be widely agreed that developing a high-quality e-learning experience costs at least as much as an equivalent "second-generation" experience (Taylor 1995). Furthermore, a lot of the

costs are being passed on to the learner, including the cost of a computer and Internet connection and of printing out the course materials, which most students choose to do.

## WHAT'S NEXT FOR FLEXIBILITY? MORE SAPS?

The OU currently teaches around 250,000 learners per year. In my view, it has succeeded, in part, because it has attracted large numbers of people who are offered the possibility of self-improvement yet who, it turns out, have relatively little chance of succeeding—the "saps" in my title. This "sap production" has involved four strategies.

1. *Being open to all.* Anybody can enter the university regardless of entry qualifications. Some counselling might be offered, but many begin without a full appreciation of the starting level, the study hours required, and the years to degree completion. They will certainly not know how low their chances are if, say, they have no qualifications and are attempting a science subject.
2. *Offering a highly polished product*. The students who leave are rarely critical of the university or the teaching materials. They tend to blame themselves or their lack of time, while recommending the experience to others.
3. *Publicizing success stories*. The case studies that are carefully seeded in the national and local press show that it is possible for the determined individual from a humble background to succeed.
4. *Providing unobtrusive exit routes for those who leave.* People can, and often do, enter the OU without telling their friends and work colleagues. There is no loss of face if they decide to give up their studies. As new students, they even get a significant fee rebate if they withdraw during the first three months.

Is this current OU model of flexibility sustainable? Will there always be plenty of saps to feed it? Well, as Niels Bohr, or possibly Yogi Berra, once said, "Prediction is hard—especially about the future," but I make a few observations:

- Demand can be kept up almost indefinitely as long as you give the marketing people enough money. The OU has to recruit some eighty thousand new students every year in order to maintain its overall student numbers.
- The OU will consider providing other services and courses and will explore other markets to tap into.
- Some societal forces will probably deflate demand, including the high proportion of school-leavers who now enter higher education; this will result in a smaller pool for the OU. Also, a recent government decision not to subsidize people taking a course at an equal or lower level to the qualification they already hold will have a negative impact.
- Some economic forces may inflate demand, including the financial recession and the proposed rise in fees at conventional universities.
- As long as we have a hierarchical and apparently meritocratic society, people will continue to try to get ahead through further study.
- Targeting those with lower qualifications fits the OU ethos of openness but brings costs in terms of higher support costs and lower retention rates.

## MOVING FORWARD

The image of the swan—serenely gliding across the surface, yet thrashing its legs furiously below the surface—appears to fit the OU at the moment. To build and sustain a twenty-first-century university based on flexible learning, the university will have to be flexible itself. It may even need to be more flexible in its interpretation of its founders' original dreams and philosophy.

As we reflect on our respective institutions, our current offerings, and our future as twenty-first-century universities and beyond, we might ask ourselves these questions:

- Will the "iron triangle" (Daniel, Webster, and Macintosh 2006), with its three criteria of wide accessibility, good quality, and low cost, guide our reflections and actions as we move into the fifth generation of open and distance learning?

- Will mechanisms be in place that promote critical assessments of the levels to which flexibility is sustainable in these challenging, competitive times?
- Will our future institutions be more willing to act in ways that reduce the gullibility factor, that stress the warning "Caveat emptor: let the buyer beware"?

And as a result, will we find ourselves proudly touting a shortage of saps?

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# 23 › What Happens in the Stretch to Flexibility?

KATHERINE NICOLL

In the previous three chapters, the authors made it clear that flexibility in learning is potentially problematic. It can be taken up in a variety of ways, bringing changes that are not always expected. Adrian Kirkwood concludes that increasing flexibility in one aspect of learning may close down the possibilities for flexibility elsewhere. Nor is it often as cost-effective as it is sometimes suggested to be. Alan Woodley argues that it is not necessarily the panacea for the individual, either, in terms of success in learning or in personal or economic terms. David Harris reflects on whether it might be worthwhile to return to traditional forms of learning and to consider lowering the barriers to that learning.

Here, I take the discussion in a slightly different direction. I suggest that flexibility in learning might do things quite other than its name suggests. Thus, although you and I might pursue flexibility in learning in institutions of learning and teaching, and we might bring about changes in those institutions as well as changes in how our students learn and how we teach, we may not always know what effect these changes have in a wider sense. To understand the significance of flexible learning is therefore also to explore changes that are wrought through it, in the name of flexibility. To better understand flexible learning is to see how these wider educational changes connect with wider changes in the economy and society in quite complex ways. Furthermore, these wider societal and institutional changes and shifts in educational practices help to raise a question about whether we want our societies to be reconfigured in these ways. If the answer is yes, then by whom? And how? Here is where the stretch toward flexibility carries big implications.

The institutional and societal change that is effected by flexible learning suggests two opposing dynamics. On the one hand, staff in educational institutions are focused on doing things by increasing flexibility in

learning. On the other hand, policy and wider meanings and rationales of flexibility seek to bring about specific kinds of educational change. These different concerns and goals are important to examine because they may combine to produce some unexpected changes: "People know what they do; they frequently know why they do what they do; but what they don't know is what what they do does" (Foucault, quoted in Fejes and Nicoll 2008). As changes in educational institutions are bound up with wider changes in society, it is important that we as educators think through the wider implications when we make decisions about what to do. To know about flexibility is therefore to have some idea about what happens through it. It is to consider what happens—or at least, what may happen—in the stretch toward flexible learning.

There is something happening through this stretch that we as educators, researchers, administrators, managers, and policy makers might need to think about a little further. Of course, insights from various instances and analyses cannot be generalized, since we work in very different settings, but where discourses may come into alignment quite similarly, similar changes might be quite likely. By getting a feel for what has been happening in different settings, it may be possible to consider what goes on in your own in a different light.

Across all these differences in the discourses of flexibility and lifelong learning, there are two main foci. First is the focus on the education institution, particularly within the university, but also in other education settings where people are entwined with practices of open, distance, or flexible learning. The second focus is on wider social and economic settings. Let us scan these two foci before I draw some conclusions and propose some questions.

## A FOCUS ON THE EDUCATIONAL INSTITUTION

Here I briefly characterize three meanings of flexible learning: increasing learning efficiency and effectiveness, using the "just in time" production approach, and changing disciplinary knowledge and learner and teacher subjectivity.

*Widening and Increasing the Efficiency and Effectiveness of Learning*

Flexible learning has been represented in a relatively unproblematic way. Early on, the open and distance learning (ODL) literature argued that flexible learning was the migration of ODL to institutions that had little or no previous experience with it. Earlier ODL practices were said to have been renamed "flexible learning" in the course of this migration. Flexible learning was therefore relatively undistinguished from ODL in these instances (Kirkpatrick 1997). Discussion in the ODL literature at that time revolved around how flexibility in learning, provision, delivery, or institutional organization could be achieved (e.g., Bottomley 2000; Hawkridge 2000; King 2000; Thorpe 2000). But what seems to have been left aside was any consideration of the increasing and widening participation in tertiary learning that was taking place in many settings where flexibility was promoted. Only a very few writers, it seems, discussed increased participation as a goal of flexible learning. Flexibility in learning was therefore not being connected to wider discussions of the need for it or to its wider significance or consequences.

Discussion was, and often still is, focused on how better to implement flexibility, leaving out any consideration of its wider effects. Many writers seem to assume that flexible learning will create an increasing and beneficial focus on the learner and/or an increase in the possibilities for student choice in learning. A reorganization of the institution as a whole is needed to support this new focus. The writers also argue that increased flexibility means wider and increasing access to learning within programs and new capacity for programs to reach markets. I have argued elsewhere that this kind of discussion is restricted by a "technicism" (Nicoll 2009). By technicism, I mean that flexibility is taken quite generally to be a beneficial characteristic of learning and of its provision and organization in that it increases the efficiency and effectiveness of learning, its provision, and its organization. How far you and I may agree with those assumptions remains to be seen.

Institutional explorations of the rolling out of programs for flexible learning indicate that discourses of flexibility may well be accepted within educational discourses that emphasize progress according to the individual's role and aims. Thus, academics may understand flexible learning as

increasing access to and equity in learning, managers as increasing institutional income and wider markets, and general staff as meeting student needs more effectively (Taylor 1997). These discourses become "accommodated," or accepted, by individuals according to their roles and existing workplace discourses.

*A "Just in Time" Approach to Production*

Of course, dissenting and critical voices from within the institution have always existed. During the first half of the 1990s, flexible learning was discussed in terms of a shift from Fordist to post-Fordist principles of production within the economy and education (see, for example, Edwards 1991, Campion 1995). The terms *Fordism*, *post-Fordism*, and *neo-Fordism* had been used for some time as descriptors of wider patterns in production processes and as distinctive phases of capitalist production. *Neo-Fordism* described a new process of "flexible production" within the automotive industry in the 1960s and 1970s. *Post-Fordism* denoted a turn toward leaner production and a disaggregation of the supply chain—a kind of outsourcing and "just in time" approach to production that directly responded to consumer demand. It was also known as "flexible specialization." This kind of discussion within the ODL literature allowed us to engage with questions of how the education institution serviced its markets. Flexibility in higher education thus denoted a turn to flexible specialization, a decentralized organizational structure focused on relatively autonomous and flexible production teams, and a "just in time" approach to production. Here then was a discourse that began to describe flexibility in learning in its relation to the market. This debate was itself criticized as focused on mechanisms of production rather that alternative possibilities, such as consumption, and for drawing on limited theoretical framings (Field 1994; Nunan 2000). But perhaps I digress here . . .

*Changing Disciplinary Knowledge and Student and Lecturer Subjectivity*

I argue here that practices of flexible and e-learning disturb previous pedagogic practices that form and maintain the disciplines as bodies of knowledge. Both disciplinary knowledge and the "subjectivities" of students are reconfigured (Nicoll and Edwards 1997). By subjectivities I mean

the way in which students are addressed, represented, and acted upon as if they are "selves" of a particular type (see Rose 1996). I am concerned to see how knowledge and students both change, in part as an effect of flexible and e-learning.

As practices shift toward more flexible forms of learning and e-learning, the "architecture" of the university as an organized learning environment is reconfigured. This architecture is designed to shape—to "discipline"—subjectivities in a particular way. The architecture of a traditional university might include a set of physical enclosures—for example, the lecture theatres, seminar rooms, and library—that require the physical presence of a learner. The student is required to be a particular kind of person: organized to attend on time, listen, take notes, engage in particular forms of talk, and so forth. This architecture also includes specific practices through which students are organized and arranged for "normalization" through learning. Here students come to know the forms of knowledge that are appropriate to work with, the literary conventions that must be observed and rehearsed, the forms of critique that are appropriate, and so on. These are "norms" of the discipline that students are expected to learn. The architecture also includes specific practices through which students are regulated, monitored, and observed in their progress—for example, formative assessment and administrative procedures. And it includes specific practices of examination (tests, essays, practical demonstrations, and so forth) through which learning of knowledge is assessed as lying within or outside the norms of the discipline being studied (history, science, philosophy, etc.). As practices shift toward more flexible forms, this architecture changes and overlaps with those in workplaces and e-sites and other places (Nicoll 2008).

It is understandable, therefore, to talk about the student as potentially "freer," as having more autonomy in flexible and e-learning. However, when you look closely, the architecture for normalization does not disappear. The student is made "open" to disciplining effects from elsewhere, and in potentially less predictable ways (Nicoll 2008). Knowledge and subjectivity is constructed outside the bounds of previous disciplines. David Harris points to a move away from disciplinary knowledge as a positive factor. But I see problems with seeing less strongly disciplined forms of knowledge as a clear "good." Opening the boundaries of disciplinary

knowledge makes other knowledge forms and subjectivities possible, but there are losses in this. We might want to notice the wider effects.

There is then an important question about the student subjectivities that are shaped in the process. Here, the flexible and e-learning student becomes governed at a distance (Miller and Rose 1993). In his essay in the present volume, David Harris talks of this student as the "individual, self-managing learner." The modern bounded and educated person is displaced by a multi-centred learner, produced at the intersection of many architectures and across the boundaries of various knowledges. Our learners today have diverse capacities and the potential to construct alternative knowledges, legitimated at least in part elsewhere, not in traditional classroom settings.

It is not only student subjectivities that change through flexible and e-learning; the subjectivities of lecturers and other professionals who work to support learning also change. Some have suggested that lecturers may become "process- and system-oriented professionals" (Miller and Xulu, cited in Harris 2006, 98). In their contributions to this book, Adrian Kirkwood and David Harris indicate that such a shift in the role of lecturers as teachers will be difficult to achieve. But where it is achieved, the traditional role as arbiter, "keeper," and transmitter of the discipline is also lost as this role is taken up elsewhere in multiple and fragmented forms. Even our subjectivities as researchers in the discipline of education are reshaped by the new relationships required for the construction of new forms of knowledge (Solomon 2008). New knowledge of flexible and e-learning is thus also bound up in change, through its own practices.

There is an increasing focus on workplace learning through moves toward flexibility in some programs. One move involves workplace mentors and assessors of learning who help to decide what is to count as knowledge. In his chapter, Adrian Kirkwood writes regretfully of the difficulties of a "legacy" of institutional forms for "gatekeeping" and the transmission of knowledge. He talks about a difficulty of "structural inertia" that makes change in knowledge production and recognition very difficult. However, as professionals in universities work hard to remove these difficulties, their activity may well help to move the responsibility for verifying knowledge from the university to other sites. Where such verification decisions are made externally, the traditional role of the university is reshaped. There is

then a question of wider societal consequences, which I feel is important to explore.

*Wider Societal Consequences*

It is uncertain what the wider societal consequences of this change are. But it is clear that the universities' role in the reproduction of societies, the shaping of subjectivities, and the allocation of people to social roles is reconfigured as knowledge becomes less "certain," less based on a single authoritative source.

This change is, however, connected with a potential for societies to lose their capacity to critique knowledge. Changes happen in how people in discipline-based societies learn how to construct and critique their disciplinary knowledge. Tom Popkewitz (2008) has noted that, in the United States, a turn toward greater access to learning has allowed a pedagogy of participation and problem-solving to be promoted in the science classroom. This new and more flexible way of constructing knowledge, he argues, prevents students from learning how to question the authority of scientific and mathematical knowledge and thus ultimately weakens a society's capacity for critique. It gives science a "latitude" that we may not want it to have.

As I said, exactly what the wider effects of flexible and e-learning are is uncertain. A discipline-based society's capacity for managing science and other disciplined knowledge may be diminished, along with its capacity for critiquing that knowledge. We need further explorations of this question, given that our disciplines have been powerfully productive in realizing the societies that we live in. Clearly, a relationship exists between our traditional mechanisms of knowledge production and our institutions and pedagogies. We do not know what effects flexible and e-learning have had or will have on knowledge production, institutions, and pedagogies when practices become joined and exert their influence more widely.

## A FOCUS ON THE SOCIAL AND ECONOMIC SETTING

For this second focus in the discourses of flexibility and lifelong learning, I discuss the shift toward post-welfare social conditions as presented in education policy literature because I think an understanding of this shift

is useful for our analyses of the changes wrought through flexibility on a wider societal scale.

*Changes from Welfare to Post-welfare Social Conditions*

The policy studies literature shows two main discourses of lifelong learning (Griffin 1999a, 1999b). In the first, lifelong learning is considered a "function" of social welfare reform. These discourses are analytic and contain critical explorations of policy proposals for lifelong learning. They draw on a social-democratic model and examine what happens with state action in welfare reform. This strand focuses on exploring the breadth and patterns of participation and redistribution of social and economic resources in society. The second strand considers lifelong learning as a "strategy" of policy. It identifies lifelong learning as contributing to the shift to post-welfare societies and post-welfare policy conditions. In this shift, action is increasingly required by people in civil society rather than through the direct intervention of the state.

It is less obvious how policies exert their influence in bringing forth discourses of flexible and lifelong learning within education arenas. Policy analysts have noted the emergence of flexibility and lifelong learning at various quite specific points in time in national and intranational policy as well as in differing locations around the globe. In the policy analysis literature, writers argue that the flexible and lifelong learning discourses have migrated from discourses of capital accumulation, theories of production and of the market, to economic and education policy. They identify flexibility and lifelong learning as metaphors that are deployed within policy and that reconfigure the discourses. Such reconfigurations may indicate quite radical changes in the social aims and purposes of education, in how we teach and learn, and understand what it is to engage in such practices. But how do they work?

Over the past two decades, flexibility has migrated into national and intranational policy as a rationale for the transformation of organizations in order to make them more competitive. Pedagogically, this goal of flexibility has been pursued through policies that place increasing emphasis on lifelong and flexible learning. Politically, it has been pursued through deregulation and the legislative transformation of labour relations. The multi-skilled, flexible worker, who is able to move from task to task,

team-working, solving problems, and learning, has been promoted as paradigmatic of the economically successful organization. Accompanying this change has been a downsizing and casualization of much employment, changes in the age and gender structure of the labour force, the development of the concepts of core and periphery workforce, and the growth of insecurity and absolute and relative inequality. Organizations have pursued their own flexibility through a range of strategies—numerical flexibility, functional flexibility, distancing strategies, and pay flexibility. In the process, they have attempted to develop new workplace identities. Educational institutions have turned toward practices for the flexible delivery of learning and pedagogical discourses. In particular, we see the emphasis on student-centredness and lifelong learning. Thus, we can see that in part through the stretch to flexibility in educational institutions, it becomes possible for organizations to develop the new workplace identities that they require.

Flexibility as a concept used in national and intranational policy forums has therefore migrated from discourses describing what is happening regarding production practices and regimes of capital accumulation to discourses that suggest what should be done within other contexts, including education. This migration is an infection across domains of discourse. Flexibility and lifelong learning are not unified in this migration; they are differentiated and dispersed in complex ways. Discussions of flexibility and learning have emerged and migrated between the realms of economics and other areas, such as industrial sociology, cultural studies, management, education, and training. As the influence of economic policy has been exerted increasingly on other domains, the emphases and issues themselves have shifted. Neither flexibility nor lifelong learning therefore denotes a single thing. We now live in very complex and multireferential discourses within our societies.

However, the increasing dominance and distribution of flexibility and lifelong learning within education policy discourses has been paralleled by an increasing commodification of educational goods and services. This commodifying of education has been incited in part through policy strategies to open institutions up to competitive pressures and by discourses of participation, student-centredness, and choice. Commodification occurs where social domains and institutions that were not concerned with

producing commodities come to be organized and conceptualized in this way (Fairclough 1992).

## CONCLUSION

I have said that the wider societal and institutional changes and the shifts in educational practices that I have been talking about help to raise questions about how our societies are meant to be reconfigured. National policies intended to encourage flexibility are increasingly global in reach. Arguments for flexibility and e-learning emerge from the wider economic policy domain and "require" us to change. These arguments connect up with discourses of flexibility and e-learning within educational institutions, where they are thought about in quite different ways, but they begin to bring about change by their acceptance.

Here the stretch toward flexibility in learning carries with it big implications.

I have suggested that flexibility in learning does other things than its name suggests. Thus, although you and I might pursue flexibility in learning in institutions of learning and teaching, we may not always know what these changes do in a wider sense. To understand the significance and implications of flexible learning is therefore also to explore further changes that are wrought through it, in the name of flexibility, and sometimes with quite other kinds of arguments from other places. We need to see how these wider educational changes connect up with wider changes in the economy and society in quite complex ways. In a small sense, I have wanted to politicize flexibility and lifelong learning in my reflections in this chapter by focusing on what happens through them. This allows us to ask questions that we might not usually think to ask.

What happens in the stretch? I am not suggesting that there should or indeed could be some unified understanding of what goes on in a stretch to flexibility. Meanings and practices of flexibility in learning are powerful, but not equally powerful, nor are they the same. Differing meanings of flexibility are embedded through differing rationales, analyses, and settings of practice. They are dispersed, fragmented, and overlapping. They do, however, form productive alliances in certain locations, and these can

systematize effects, although in ways that produce change in a complex and unpredictable manner. Discourses of flexibility and flexible learning are embedded within policy rationales for change and are deployed, in part, through policies that try to govern society or institutions. They are constructed and deployed within institutional settings in relation to educational practices. They are also—and we shouldn't forget this—constructed and deployed in and through the media, research and scholarship, and everyday places. Even our own research and scholarly writing on flexible learning are connected in relatively systematic ways to the changes that take place more widely. The media and our everyday talk and practices are also connected in the sense that it is through the repetitions of our talk that we "make" our identities and the worlds in which we live.

What happens, then, through flexible learning? I have argued that discourses of flexible learning within the education institution are constrained by their focus on change in a relatively limited sense. To consider what happens—or, at least, what may happen—in the stretch toward flexible learning requires us to look across domains of discourse to see how they become articulated and systematized. It is to see how they do things through these interconnections. Discussions of flexibility and learning in educational locations are connected with other discussions in other places. As the influence of economic policy has been exerted increasingly in other domains, the emphases and issues themselves have shifted. However, in many of these domains, what happens is that education becomes connected with the economy through its requirement for new forms of flexible, lifelong-learning workers. However, neither flexibility nor lifelong learning denotes a single thing. We live with complex and multi-referential discourses within our societies. What goes on in our stretch to flexibility in educational institutions—within our local and national settings, and across the globe—becomes an important question to answer, as flexible learning helps to realize the societies in which we live and our global interconnections.

I have only written a little of what could be written, as theorizing and politicizing is always ongoing and is necessarily born out of what I can articulate from where I am and the resources available to me. Allow me then to leave you with some questions that might be useful for your own work setting—from the resources available to you:

- What happens through flexible learning when you look at the ways in which discourses connect up in your setting and more widely?
- Do you see changes that occur well beyond the immediate learning and teaching arena? If so, which of these do you wish to accept or reject?
- What characteristics of education that are not related to flexible learning might be important to promote?
- Which flexibilities might realize a society and global interconnections that you want to live with?

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## ABOUT THE AUTHOR

Katherine Nicoll says that she has always been intrigued to find out how things figure! She jokes that she borrows from Nick Perry (1998) in putting the horse before the cartography in her travels in research in education. She has been moving on in her explorations ever since they began, entertaining along the way "burgernomics," "metaphor," and the "discursive wedge" as tools for theorizing and politicizing knowledge of education and education policy. Nor has Katherine stayed in one place as she has moved on. She has worked in Papua New Guinea, Australia, and England, and is currently Senior Lecturer at the Stirling Institute of Education, University of Stirling, in Scotland. www.ioe.stir.ac.uk/staff/nicoll.php

# Conclusion
## *The Challenge of Weaving Principles with Practice*

ELIZABETH BURGE, CHÈRE CAMPBELL GIBSON, AND TERRY GIBSON

It is time now to gather these essays and section summaries into an ending. From this rich selection of material, we have extracted questions and challenges that especially caught our attention. These we have arranged into six sections: general impressions, defining flexibility, assessing institutional politics and change dynamics, designing and managing flexibility for students and teachers, false promises and false prophets, and interrogating our practice. Because we wished to preserve their voices, we have often quoted our contributors directly.

### GENERAL IMPRESSIONS

First is the sheer numerical scale of opportunities for the informed development of flexible access policies, of learning and assessment designs, and of teaching methods. The basic educational challenges around context-sensitive quality teaching and learning remain, even when mediated by changing technologies, but the scope for educational remediation and the development of human skills is now huge. Allied to scale is our second impression—the sheer diversity of learner groups. Local culture and current barriers and opportunities do influence students' access to and success in higher education, as Victor Chen, Rose Liang, and Yu-mei Wang suggest. Colin Latchem and Insung Jung, and likewise Milly Daweti and Jean Mitchell, remind us, for example, that the market in educational content may not always be kind to learners in cultures remote from the culture of the country that produced the content.

Our third impression is the quality of analysis, the ethical stances, and the depth of experience that all the authors bring to this book. As Arthur Wilson notes, they are indeed "fully reflective, analytical, and insightful professionals." We see their skill with narratives that illuminate the stressors that often accompany institutional rhetoric and new policy directives. Many authors question the discourses of defining flexibility and ask that we grapple with issues that lurk below the surfaces of everyday work.

Most important is their general injunction to treat the "F" word as a highly complex and often disputed term. Its meaning frequently reflects multi-layered responses to government and corporate economic agendas. Kathy Nicoll argues that the concept of flexibility is a fluid, not a static one, often connected to the "production" of the "multi-skilled, flexible worker, who is able to move from task to task, team-working, solving problems, and learning" and "has been promoted as paradigmatic of the economically successful organization."

Also key, we learn, is our analytical duty to label the limits of flexibility in practice. Listen to David Harris, as just one example:

> Clearly, flexible learning encompasses as many paradoxes and contradictions as conventional learning. It is important to avoid seeing flexible learning as some panacea and to view it instead as an ambiguous development, one that requires intervention to develop the "good" sides and avoid the "bad." The provision of interactive technology alone will not solve the problems posed by the existing social, cultural, and professional barriers to participation on the part of both students and staff. The most passionate advocates of flexible learning do seem to recognize this, in a way.

Our thirty-three colleagues also bring with them a legacy of experience that enables them to recall the values that drove flexible practice earlier in the twentieth century, such as proof of increased access to higher education, managed quality of teaching materials and processes, and learner-relevant advice and tutoring services. Yoni Ryan is one such pioneer:

> I prefer to revisit those typical early definitions of *flexibility*, the ones that emphasized learner-centredness, more choice over entry pathways, information on courses and services, and second- and third-chance

> opportunities. There the student, not the technology, is the pedagogical driver. That's a principle worth our patience.

In opening this book, Frits Pannekoek calls for a return to the earlier foundational goal of distance education, one that did not centre around a for-profit business model that too often excludes the less well-off:

> What remains clear is that "open universities" and the flexible-learning movement must seize the initiative again to ensure that flexible learning becomes the hallmark of the public movement to remove all barriers to learning—the barriers of time, geography, income, and ethnicity. The quest for equity should not become an opportunity for profit!

Mary Simpson and Bill Anderson (like others) value working within a recognized professional history, a condition of knowledge and principled support that we three have found to be immensely gratifying, as well as necessary. "History is important," they write. "Knowledge of the field of open and flexible higher education and of developments that have brought us to the present must guide us toward quality provision." They go on to point out that "distance education is not a recent development, nor is it a static field. . . . Each generation of distance educators has, or should have, taken from the previous one and built on it."

Generally, our authors both illustrate and argue for taking the long view of educational practice. The successful adoption of changes in policy or even of procedures designed to ensure greater flexibility (however defined) requires enormous institutional energy. It takes time to summon up such energy: it is not merely a matter of accepting delivery of a new product or idea and expecting that it will then be widely adopted. Time is also used up in developing the changes expected from new teaching, management, or system surveillance technologies. As Yoni Ryan says, "it takes the university time to digest the technologies it ingests." Andrew Higgins and Mark Northover explain, for example, that not all institutions give staff enough time and "space" for the inevitable mishaps or near-misses in quality control.

Our fourth and final impression is the key lesson that strategic intent toward flexibility (however defined) does not necessarily translate into

sustained change toward improved flexibility: see, for example, Cathy Gunn's chapter. Mary Simpson and Bill Anderson ask, "Why does high-quality open and flexible higher education remain so elusive and seemingly so hard to achieve?" We need to better understand why: not merely identify which factors are operative, but find out how many of these are covert and depend on the channels of subterranean power. Many restraining factors are discussed throughout the chapters, but among the key ones are these: institutional inertia, too-brief responses to rapid change, universities that value research monies and results over teaching excellence, what Mary Simpson and Bill Anderson describe as "unhelpful systemic rigidities" encountered as institutions mature, competing agendas within and across institutions, and accompanying external political and economic pressures and discourses, whether covert or overt. Kay McKeogh and Seamus Fox put it this way: "Certainly, if we (personally) were to design the truly flexible and adaptive university, we wouldn't start with traditional universities." Ultimately, however, strategic intent toward greater flexibility succeeds in producing clear and generally understood (if not always easily accepted) action when its proponents possess a sophisticated understanding of institutional politics. Especially important here, as the chapters by Hardy, Higgins and Northover and by Scantlebury and Needham illustrate, are the attitudes and perceptions held by senior administrators but rarely signaled as they manoeuvre to advance their own agendas. As Arthur Wilson reminds us, "Money and interested parties can often be counted on to conflict."

## DEFINING FLEXIBILITY: DIFFERENT THINGS TO DIFFERENT PEOPLE

Julie Willems notes that a wide variety of definitions of *flexibility* exist:

> The interlinked terms *flexible learning* and *flexible delivery*, in both skills-based and knowledge-based post-secondary contexts, have been conceptualized in a vast number of ways and according to the perspective of the various stakeholders involved. These stakeholders have been identified as the politicians, managers, administrators, marketers,

program and product developers, teachers, support staff, and students involved in any flexible-learning program.

In the introduction to this book, Liz Burge refers to Ted Nunan's advice to his readers to wax critical. As she points out, Nunan (2000, 50) argues that it is up to practitioners to decide "whether to support or resist the changes that parade under the banner of flexibility," in spite of the intellectual challenges posed by the "multiple meanings" and "contested terms and concepts" that cluster around the notion of flexibility. Terry Evans and Peter Smith refer to these multiple meanings as the "fogginess of the terminology," which in turn helps to generate the "fog of flexibility." And Yoni Ryan reminds us that the "early conceptions of flexibility, in the 1980s, encompassed a more holistic notion of how education systems and practices must change to encourage more students to consider 'learning for life' and to accommodate difference and diversity in our societies."

Communications scholar David K. Berlo (1966) argues that meanings are in people, not in words. As the scholars in this book have noted, the term *flexibility* has many dimensions and means different things to different people within the context of an institution, a faculty, an administration, a student body, and employers. Within those contexts, the applied definition of *flexibility* may vary considerably among individual faculty members, students, administrators, and so on. Colin Latchem and Insung Jung use the metaphor of the blind men and the elephant to help us understand the quandary of trying to define *flexibility* while each of us has a hold of a different part of the whole.

As Chère Gibson and Terry Gibson note earlier in this book, "the biggest challenge is to define *flexibility* in the context of your own institution and specific set of circumstances and then to use that definition to frame policies, procedures, and costing models that can be widely communicated, whether these pertain to students, faculty, or the institution itself. Arriving at the situational definition of *flexibility* should be a collaborative process, one that involves students, faculty, administrators, and funding agencies."

Flexibility may, in the current wave of massification (moving from an elite to a mass public-sector higher-education system), be championed as the solution for cost-effective education for the masses (see Yoni Ryan's

chapter, as well as the chapter by Daweti and Mitchell). As Frits Pannekoek observes in his foreword, "those countries that can sort out the cultural, political, economic and institutional realities of flexible learning will be the leaders in the new knowledge economies."

The challenge is to get it all sorted out: to get *flexibility* defined in situational terms while being cautious about using flexibility as a slogan for higher education.

## ASSESSING INSTITUTIONAL POLITICS AND CHANGE DYNAMICS

As Arthur Wilson reminds us, "flexibility does not come free or without burdens, costs, challenges and constraints. Everyone knows that. But actually understanding your context—that is, understanding your organizational setting well enough to create possibilities of/for flexibility—is another matter altogether." The question is, where to start?

All too often, we experience the problem of hierarchy, which inherently privileges the knowledge of senior administrators. Failure often begins early, particularly in the context of flexible learning, when administrators neglect to consult with those who hold the most direct, experienced-based knowledge. Cathy Gunn notes that "devising strategy at the top of an organization and driving it downwards is excellent in many respects" but goes on to discuss the pitfalls of this approach:

> Where it often falls short in the context of flexible learning . . . is in its failure to foster grassroots involvement from the outset. This behaviour overlooks the value of drawing on the experience of those already familiar with developing flexible-learning programs through a process of experimentation, evaluation, and changed practice. Without this grounding, risky forecasts, sales pitches, and personal or political agendas may become the significant drivers.

How do we start to create possibilities of/for flexibility? First, we must assess power interests across the organization. "As change managers know," write Andrew Higgins and Mark Northover, "the strategic success

of any substantial innovation will be determined by the politics of the process rather than by the inherent value of the innovation itself." Second, it is critical to focus on capacity development, with an eye to seeing all possible roadblocks. As Cathy Gunn observes, "faculty and organizational development through action learning are key enabling methods, with the core aim being to identify and remove barriers to the achievement of strategic goals. The examination of different perspectives is important because the impact of strategic plans varies according to individual roles, priorities, and experience." Third, to ensure sustained strategic success, we need to attend diligently to how staff interact at various levels of administration and how professional trust may be cultivated inside those interactions. Darcy Hardy advocates breaking through "the barrier of mistrust" through "the establishment of strong relationships," nothing that "when some of those relationships are with influential administrators, they can open doors across an entire campus—or a system, for that matter."

We must expect to identify a wide range of institutional challenges to flexing institutional policies and procedures. The major challenges are, according to our authors, lack of consultation across the academy, lack of a shared and personal vision of flexibility in higher education, time-strapped faculty, protective staff when it comes to course design and intellectual property, conservative teaching methods, perceived lower esteem placed on teaching in comparison to research, concerns regarding lack of funding and its impact on the quality of teaching, rapid arrival and departure of technologies for teaching, perpetual "politicking" and boundary disputes, and an overall frustration with the slow pace of institutional change. Sadly, the findings of Kay McKeogh and Seamus Fox may be more universal than one might hope, as their contextual analysis revealed "widespread support for the rhetoric of flexibility and accessibility, combined with a deep-seated attachment to the traditional model of students sitting in classrooms listening to lectures." We need to understand the challenges and constraints if we are to move beyond them!

Perhaps our greatest challenge is to create a learning organization. Arthur Wilson quotes Peter Senge, a management change expert with a focus on these kinds of organizations, and his colleagues, who argue that "it is not enough to change strategies, structures and systems, unless

the thinking that produced those strategies, structures and systems also changes" (Senge et al. 1999, 15). Speaking of technology's role in widening access, Arthur Wilson urges us to "see these multiply mediated mechanisms of interaction as fundamentally shaping human cognition and interaction, as well as being shaped by them," pointing out that "just as a book shapes the way we think and how we think shapes the formation of the book, so too such reciprocal shaping occurs in the digital age."

Therefore, the on-the-ground lesson here for increasing operational flexibility is cognitive flexibility, but this is not an easy accomplishment. Thinking about new technologies, experimenting with new paradigms of teaching and learning, and moving beyond one's disciplinary focus may be asking a lot of our faculty colleagues, and changing the policies and structures that emerged from traditions of another time seems daunting. How do we support them across these activities? As Wilson warns, unless we grapple with understanding "how fundamentally human cognition and interaction are changing," we may yet "fall short of meeting the goal of enhanced access and ever more genuine flexibility."

## DESIGNING AND MANAGING FLEXIBILITY FOR FACULTY, STAFF, AND LEARNERS

While we design for flexibility, broadly defined, we must support for success. That said, will there be enough time to refine existing teaching models inside the whirl of new technology opportunities and information transfer? "Traditional frameworks for the development of academic knowledge do not sit comfortably with the speed of information sharing and information production that the Internet supports," notes Denise Kirkpatrick. "An absence of new pedagogic models creates uncertainty for students and staff, and this is a challenge that we must tackle with great urgency."

Yet Cathy Gunn argues that there is hope: "Experience shows that the pedagogical knowledge of capable teachers and/or learning designers in a supportive environment is the most effective driver of flexible learning at the level of practice." One major barrier to the development of this pedagogical knowledge is the lack of structures, funding, and reward systems to support staff development and training. Our authors recount

many an effort that—in spite of managerial clout, rigorous research, monetary incentives, faculty support, student desires, and the passage of an inordinate amount of time—elicited neither faculty interest nor uptake. Andy Lane reminds us that "whatever the intended audience, it takes focused measures and much time to develop communities of practice that are durable." But, for example, Kay McKeogh and Seamus Fox refer to two levels of resistance here—increased workload worries and conservative transmission models of teaching: "From interacting with colleagues, we know that there is little incentive for staff to take on the extra workload that would inevitably result from increased enrolments and the adoption of more innovative teaching and assessment methods," they write. "However, even were adequate support and funding available, there is lingering skepticism about e-learning." And this skepticism endures, even in the face of countless studies highlighting the outcomes of flexible teaching vis-à-vis the benefits of traditional higher education. Denise Kirkpatrick, among others, reminds us of the scale of the difficulties: "The introduction of flexible learning through information technologies is accompanied by serious challenges to the identity of academics, the construction of the notion of teaching and learning, and places strong demands on the culture and expectation of academic practice and higher education" (Kirkpatrick 2001, 175).

Perhaps as we reflect on supporting faculty and staff, our initial efforts should be directed at helping our colleagues re-examine their beliefs and practices related to teaching, learning, and pedagogy, as Adrian Kirkwood, Melody Thompson and Lorna Kearns, Alan Woodley, Denise Kirkpatrick, and others suggest. As Kirkwood observes, unless teachers engage in such re-examination, "technology will never do more than reproduce their existing approaches to learning and teaching, no matter how appropriate or inappropriate these might be." But some might ask whether all our effort is perhaps misplaced. As David Harris suggests, tongue in cheek, "it might be more effective instead to put effort into diminishing the barriers to traditional education." Then again, the growing range of technology-enhanced learning opportunities may also improve the flexibility for our on-campus students, as Kirkwood points out.

To the challenges of time, limited pedagogical knowledge, inherent skepticism, and the need to re-examine long-held pedagogical beliefs

and practices, Denise Kirkpatrick and Greville Rumble, among others, add yet another—keeping flexibility innovations cost effective within the increasingly competitive university budget processes. Added to that challenge is the peril of too much choice. As we encourage use of wikis, blogs, virtual learning environments, and other Web 2.0 and Web 3.0 tools, we confront faculty and students alike with the need not only to identify the range of tools available but also to select and use tools appropriately for the teaching-learning task—to say nothing of the challenge of evaluating learning. How do we provide reliable and informative help desk and support services for faculty and learners alike across the variety of teaching and learning tools in cost-effective ways?

Perhaps we need to return to Arthur Wilson's suggestion that we explore how fundamentally human cognition and interaction are changing and to Lane's suggestion of supporting faculty, staff, and learners through the development of communities of practice. To what extent are these changes in human cognition and interaction supportive of new models of teaching and learning, and of communities of practice and communities of support? What new models of support emerge for faculty, staff, and learners in this new environment of collaborative tools for teaching and learning? Which of these models enhance faculty and staff efficacy, satisfaction, and learner outcomes?

## FALSE PROMISES AND FALSE PROPHETS

Some institutions have found it easy to seduce adults (and potential flexible-learning students) with false promises of easy enrolment, no requirements for prior knowledge, available financial aid and easy payment plans, easy-to-use technology, learning anywhere any time, 24/7 technical and academic support, a great wealth of resources via Web 2.0, and immediate employment in a high-paying position. Recent hearings in the United States Congress and articles in the *New York Times* testify to some of the unscrupulous tactics of non-profit and for-profit providers of "flexible" higher education. (See, for example, "Scrutiny Takes Toll on For-Profit College Company, 9 November 2010, www.nytimes.com/2010/11/10/education/10kaplan.html?_r=1). As Alan Woodley notes

in his chapter, "Plenty of Saps," some flexible-learning institutions have made it easy for students to enroll, pay their tuition, and then fail to complete their studies. One "dirty little secret" is that some flexible-learning institutions keep their balance sheet positive only because a significant number of students don't complete all their assignments. Tutors don't have to be paid for assignments that aren't completed.

The competitive environment—advertisements via television, radio, Google, Facebook, YouTube, newspapers, air travel magazines, pop culture magazines, and so on—gives prospective learners a wide array of choices, many of which make claims about the ease of learning and the degree of flexibility that is offered to the student. Missing from the marketing hype is any discussion on helping learners learn how to learn in a flexible-learning environment. Darien Rossiter notes that Cranfield University in the UK faces this issue of promise versus performance: "The vast majority of our learners are mature-age students, and while distance and online learning offers them greater flexibility in the workplace and in their lifestyles, many are not well equipped to be confident and successful independent learners." Reflecting on the development of flexible-learning systems for the "real world," Julie Willems further observes that "not all flexible-learning scenarios deliver the required skills sets in a scaffolded manner. I have already touched on the issue of how mature students are sometimes disadvantaged by relatively weak computer skills, a barrier they must work to overcome. Some students feel that they are plunged too early into complex content and left alone to cope—a sink-or-swim mentality."

Effective flexible programs, as Michael Moore (2006, viii) describes them, offer "greater flexibility, less structure, greater opportunity for dialogue between teachers and learners, and [give] more control of the teaching-learning process to the student." But we must all ask: Are all learners willing or able to assume this greater flexibility with less structure, more dialogue, and more control over their learning? Will they need time and support to grow into greater skills for flexible approaches? More time means more institutional resources for guidance. To what extent is increased student control seen as culturally appropriate? Richard Edwards and Julia Clarke (2002, 156) argue that flexible learning offers students a kind of competitive individualism, "a supermarket for self-managing individual lifelong learners to pass through, collecting the resources they

need to develop themselves in a society of control." But they also note that this kind of individualism can be stressful and unwanted, offering a kind of limbo that can positively deter a hesitating student. Referring to their study of adult students contemplating entering further education, Edwards and Clarke suggest that some boundaries may bring some comfort: "Place, closure and constraint would therefore seem to have a positive value for many of the interviewees" (164).

Rapidly changing technologies add an additional dimension to complexity. As Yoni Ryan notes, we must deal with the "false prophets" who promise that the latest technology will bring about a revolution in education. They are plentiful and are keen to promote their hope and their hype. But being the first to adopt any new technology comes with challenges: sometimes the leading edge becomes the bleeding edge, as when later potential adopters refuse to accept expensive new technologies for various good reasons based on their own workplace culture. Institutions need to closely examine the "flash" versus the longer-term impacts and substance of new tools. What is here today may be gone tomorrow. The learning curve for managing such volatilities may be steep for institutions, faculty members, and students.

As Andy Lane points out, open educational resources have brought to some learners a delight of new learning opportunities and, to others, a dizzying array of options. Choice may become a burden when students are confronted by today's information "forests." Non Scantlebury and Gill Needham ask us how prepared we are "to see anarchy reign" in our garden of learning and whether we will "get involved in helping learners navigate its delights."

## INTERROGATING PRACTICE

The framing of paradoxes (Harris's chapter), the use of provocative language such as "sap-production strategies" (Woodley's chapter), and the asking of penetrating questions are notable in this book. We present here a representative selection of questions that made us pause, or grin in agreement, or think up a subsequent question (in italics). These questions, which prompt us into alternative avenues of analysis, may be useful

for both university-degree studies and professional-development activities in higher education around the world.

Like Andy Lane, Yoni Ryan, and Arthur Wilson, we are concerned about technology-driven thinking that encompasses, for the most part, only the latest products or theories. "But I am left troubled by the questions raised by Lane and Ryan," says Wilson. "Is flexibility contributing to an ever more inequitable world, and is the technology itself (in its ever-evolving guises) supplanting pedagogy? I must say that in my own area of higher education, and with my earlier disclaimer still in play, I find these proclivities persistent and perhaps even pernicious". It may be useful to recall a famous design principle still valued today: Leonardo da Vinci believed that simplicity is the ultimate sophistication, and the great German-American architect, Mies van der Rohe, believed that "less is more." In other words, think with elegant but rigorous simplicity. Cathy Gunn's plea echoes these principles: "The seemingly simple but penetrating questions remain: What are the missing links between policy and practice; why have they proved so persistent, and what can be done to address them?"

*The Questions*

Melody Thompson and Lorna Kearns pose a series of questions to call for more rigorous analyses of flexibility in action, especially for long-term action after the consultants have left:

> Is the flexibility manifested in the production of flexible employees, thus benefiting employers? Is it the hope of institutions looking for flexible alternatives to brick-and-mortar expansion? Is it access to an education no longer in-flexibly bound by age norms, standardized levels, and traditional formats, thus benefiting learners who missed out "the first time around"? Does flexibility consist in allowing instructors to teach in ways that express their own goals and needs as professionals? Flexible education can be all of these things, but it cannot serve all stakeholders equally in each context.

*Who, ultimately, may benefit the most publicly from institutional changes toward flexibility? And whose less-visible expectations ultimately carry the most power?*

"From where we stand 'here,' the pathway to 'there' is strewn with many barriers, detours and dead ends. So to what extent is it possible to actually get 'there' from 'here'?" We extend Kay MacKeogh and Seamus Fox's thinking to ask: *Are you sure that you have mapped "here" well enough? That you have included the dynamics of the clash between the forces of tradition and the forces of institutional marketing rhetoric?*

Denise Kirkpatrick poses some questions that directly affect her job as a senior administrator at the UK Open University: "How can we provide flexibility without complexity and create minimal confusion for our students and staff? How much choice is too much? . . . How can we provide flexibility in cost-efficient ways? . . . How do we ensure that learners can use these new forms—do students and staff require new literacies?" *Is there any operational "room" in the institution for centrally managed quality control of learning materials and literacy development?*

Kirkpatrick goes on to ask:

> As our students are accessing the vast and rapidly growing body of information on the Web, how do they and we assess the value and credibility of sources? In a world where academics can build their courses "on the fly"—in real time, incorporating late-breaking news—and where students can create and co-create content, how do we ensure the quality of the materials, assure the authority, and the address the requirement that all learners have an equivalent learning experience?

*How do we ensure prudence and respect for some time-honoured principles of innovation-adoption criteria (Rogers 2003), the classic four "Laws of Media" (McLuhan and McLuhan 1988), and technology's unintended effects (Tenner 1997), as well as context-sensitive teaching and learning principles?*

Arthur Wilson agrees with Andy Lane on a key point about innovation impacts: where are the negative and unintended effects? "Lane asks two very important questions," he notes. "Will flexibility really create access to new ways of knowing and learning, and/or will flexibility help to engender a new type of inequality?" Alan Woodley questions whether one of the icons of twentieth-century distance-education development, the UK Open University, truly has achieved better access to education.

Given the university's four "sap production" strategies for building or maintaining student enrolments, how does the grand goal of flexibility apply operationally? "Is the pursuit of flexible education merely a cynical attempt to reduce teaching costs?" he asks. "And what impact does flexibility have on our efforts to break open that iron triangle of accessibility, quality and cost?"

And here we bring in the argument made by Daniel, Kanwar, and Uvalić-Trumbić (2009) for changing traditional definitions of quality in higher education in order to ensure more flexibility for students, especially in developing countries. Earlier conceptions of quality were based on high tuition cost and low or reduced access (exclusivity). Essentially, the revised model would delink high-cost residential study and localized examinations and instead use high-quality, standardized tests to achieve greater portability and allow students to study for them in whichever contexts they prefer. Such flexibility would especially help economically developing countries because "the aims of wide access, high quality, and low cost are not achievable, even in principle, with traditional models of higher education based on classroom teaching in campus communities. . . . Although this type of system has a long history, contemporary technologies such as eLearning and open educational resources promise to make it even more cost-effective today" (Daniel, Kanwar, and Uvalić-Trumbić 2009).

*One question, therefore, is this: if universities anywhere want to flex into new market opportunities with meaningful flexibility for students, what are the optimum ways of handling the vectors of cost, quality, and access?*

Signing off . . .

Our authors refer back to earlier valued principles of flexibility in higher education (in weaving terms, the warp). You have also read of all the cross currents and contextual complexities in the discussions (the weft) that illustrate varying views of the operationalization of flexibility. We leave you now with the opportunity to consider how the warp and weft in your own institution might weave the conditions for at least *some* greater, and sustained, flexibility.

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