

OPEN AND DISTANCE LEARNING PRACTICES IN SOUTHERN AFRICA: COLLABORATIVE INITIATIVES



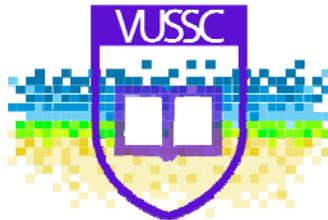
S. Modesto Tichapondwa
Editor

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Open and Distance Learning Practices in Southern Africa: Collaborative Initiatives

Edited by S. Modesto Tichapondwa

Foreword

In 2006 the Commonwealth of Learning published *Strategies for Sustainable Open and Distance Learning* as part of a series of world reviews. I am delighted that Stanley Modesto and his co-authors have followed this up with this volume on *Open and Distance Learning Practices in Southern Africa*. ODL is particularly vibrant at all levels in this region and the papers in this book bear testimony to its steady development.

The book weaves together contributions about collaboration, creativity, innovativeness, reflective practice, benchmarking, and scholarship into the overarching theme of sustainability.

Debates about whether awards gained through ODL are comparable in quality to those from conventional institutions have been a staple of the field for many years. The advent of the open universities did much to make ODL more professional and systematic and new institutions and programmes have been able to build through collaboration on a foundation of good practice rather than starting from scratch.

While ODL used to be called an industrial form of education its practitioners must be highly creative, particularly in developing countries where they must invent sustainable economic structures for their teaching and learning systems by combining technologies and approaches in judicious ways.

ODL institutions have no choice but to innovate because, although the technologies on which they depend are changing all the time, not all new devices or systems are necessarily either useful or cost-effective. Much depends on how students can access equipment and how they prefer to study. In this way southern Africa began to use mobile technology in ODL well before richer countries had seen its potential. Innovation to create new learning products and services requires teamwork and understanding of stakeholder needs. New technologies sometimes provide solutions to longstanding problems.

For this reason it is particularly vital for distance educators to work in a spirit of reflective practice. Put another way, we must operate in a self-conscious manner since the backgrounds of the students we teach, the content of the subjects that they are learning, and the media that connect student and teacher, are all changing more rapidly than in conventional classroom instruction. Unless we are aware to this our systems, far from being sustainable, will steadily deteriorate.

Two key aspects of reflective and self-conscious practice are to write up and publish evaluative accounts the development of one's own institution and to stay in contact with other comparable operations. The chapters in the book show admirable evidence of this. Clearly these ODL practitioners are being influenced by practice elsewhere. The technical term for this is benchmarking and the challenge is to choose benchmarks with sufficiently similar organizational and cultural similarities for useful

contrasts of efficiency and effectiveness to be made. If this is done benchmark institutions can be a source of guidance and inspiration.

Wider research and scholarship is an extension of benchmarking and the authors devote due attention to this. The volume and quality of research on ODL has grown dramatically since I began work in the field 40 years ago. Indeed, as conventional institutions adopt ODL approaches under the banner of 'blended' or 'flexible' learning, they have launched a new wave of research, much of it rather naïve, aimed at comparing the outcomes of distance and classroom learning. Such research would benefit from greater awareness of the impressive corpus of scholarship that ODL has built up over the years.

It is, therefore, a great pleasure to welcome this volume on ODL in Southern Africa and commend its editor and contributors for a most useful addition to a literature. This literature is an essential resource for all those who want Africa to offer quality educational opportunities to all.

Sir John Daniel

*President and CEO
Commonwealth of Learning*

Acknowledgements

This is the first volume that comes as a direct result of collaborative effort in the Southern African landscape of distance education (DE). The Coordinating Editor was commissioned by the SADC-CDE to lead in the development and production of the book, which was part of the SADC-CDE's project that fell within its 2009 – 2012 Logical Framework. The Botswana College of Distance and Open Learning (BOCODOL) continued to give unwavering support from the conceptualization stage to the final product. This phenomenal contribution is duly acknowledged.

The SADC-CDE, under the auspices of the Botswana College of Distance and Open Learning (BOCODOL), timeously managed to convene a research and scholarship colloquium at which the majority of the contributors to this volume were able to meet. During the ensuing five days, they were able to consummate the central idea, deliberate over the content to be included, and came out with a draft outline for the book.

Notable among the participants were distance education practitioners enrolled for the Practitioner Research and Evaluation Skills Training (PREST) in open and distance learning, an international professional development programme on research for practitioners. Their contribution to the volume has remained spectacular, enhanced by international scholars drawn from Southern African institutions, whose mentorship of learners and contribution to the project remains the most significant comprehensible input.

Quite a few of the contributors made themselves visible at the Distance Education Association For Southern Africa (DEASA) conferences, at which forum they made exciting presentations on ODL matters. The Editor took advantage of this opportunity to convert some of the papers into chapters that appear in the volume. Above all, the contributions would have remained without substance had they not been based on the many institutions to which the authors make references for exemplification.

The role played by critical reviewers, notably, Prof. Manthoto Lepotho of the National University of Lesotho, and Catherine Daniel of Stratford Hall School, Vancouver (Canada), accounts for the final shape and impact that characterises the volume. The Editor, therefore, takes this opportunity to attribute acknowledgements to contributors mentioned above, and to any others who may have escaped mention.

Finally, the Editor observes that the contents of chapters, in the form of statistics, case studies, and examples is representative of the authors' socio-academic slant, and not necessarily that of the institutions cited. Coming up with the volume was also a challenge of considerable magnitude to all contributors, and the Editor takes this opportunity to compliment the selfless apportionment of scarce time to this noble course aimed at furthering the agenda of open and distance learning.

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Miriam Chitura is currently the Dean of the Faculty of Science and Technology at the Zimbabwe Open University. She is a Senior Lecturer on the ZOU BSc Nursing Science Programme, a DE programme. She has authored and reviewed ODL Health Sciences modules. She has conducted research in the field and has presented papers at various International conferences. She sits on several University committees and is a University Council member, and this exposure helps her to articulate ODL issues to strategic partners.

Matlhoatsie Eunice Masendu is currently Editor at the Department of Distance Education, University of Botswana. She has served as a classroom teacher, in-service education officer, inspector of schools, tutor, trainer and facilitator. She has participated in COL supported ODL materials development projects for the SADC region. In particular, she facilitated the development of the General Education Courses (GECs) section of the Science, Technology and Mathematics Programme 2000+ (STAMP2000+) and the KwaZulu-Natal Training Materials for Women Managers.

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ABBREVIATIONS

ACDE – African Council of Distance Education
ALDN – Africa Learning Development Network
ANOVA – Analysis of Variance
BOCODOL – Botswana College of Distance and Open Learning
BOTA – Botswana Training Authority
BPS – Botswana Police Service
CCE-UB – Centre for Continuing Education University of Botswana
CDE – Centre for Distance Education
COL – Commonwealth of Learning
DEASA – Distance Education Association for Southern Africa
DE - Distance Education
DED – Distance Education Division
DNFE – Department of Non-Formal Education
DPE – Diploma in Primary Education
FC – Fixed Cost
IB – Incremental Budgeting
ICI – Interactive Communication for Industry
ICTs – Information Communication Technologies
IGNOU – Indira Gandhi National Open University
INQAAHE – International Qualification Association Agency for Higher Education
IPFM – Institute of Professional Financial Management
IRI – Interactive Radio Instruction
KYU – Kiyambogo University
MADE – Master of Arts in Distance Education
MC – Marginal Cost
MCDE – Malawi Centre for Distance Education
MDGs – Millenium Development Goals
NAAC – National Assessment and Accreditation Council
NADEOSA – National Association of Distance Education for South Africa
NAMCOL – Namibia College of Open Learning
NDP – National Development Plan
ODL – Open and Distance Learning
OECD – Organisation for Economic and Cooperative Development
OER – Open Education Resources
OU UK – Open University United Kingdom
PBB – Performance-Based Budgeting
PC – Personal Computer
PCTS – Performance, Cost, Time, and Scope
PERT – Programme Evaluation Review Technique
PID – Project Information Document
PMBOK – Project Management Body of Knowledge
PPS – Project Planning and Scheduling
PREST – Practitioner Research and Evaluation skills Training
QA – Quality Assurance
QAAA _ Quality Assurance and Accreditation Agency
QF – Qualifications Framework
RNPE – Revised National Policy on Education
SADC – Southern African Development Community
SAIDE – South African Institute of Distance Education

SMS – Short Message Service
SSA – Sub Saharan Africa
SSBM – Small Scale Business Management
STOU – Sukhothai Thammathirat Open University
TVET – Technical and Vocational Education Training
UNISA – University of South Africa
VC – Variable Cost
VUSSC – Virtual University for the Small States of the Commonwealth
WBS – Work Breakdown Structure
WUA – Women’s University in Africa
ZBB – Zero-Based Budgeting
ZDECO – Zimbabwe Distance Education College
ZIMSEC – Zimbabwe Schools Examination Council
ZINTEC – Zimbabwe Integrated National Teacher Education Course
ZOU – Zimbabwe Open University

Introduction

Ten years ago, the spirit of research, collaboration, and entrepreneurship in open and distance learning (ODL) was ignited at the University of Swaziland. This was in 2001, at the annual conference of the Distance Education Association for Southern Africa (DEASA). The Association has progressively become the cradle and think-tank of progress for the new, firmly established, and developing discipline of Distance Education (DE).

The spinoff of the defining moments of the said conference has been the presentation of conference papers, tapping on a wide array of ODL issues. In the monitoring of subsequent DEASA conferences, the Editor has noted the unmistakable degree of seriousness in the interactive discourse about the manifestation of ODL in Southern Africa (as the conferences rotated from one country to the next). DEASA, thus became the rallying point for systematic effort by ODL institutions, organisations, and scholars as they celebrated a resurgence of purposefulness.

In this budding Spring of creativity and innovativeness, there came partners whose role has become pivotal, notably, the Commonwealth of Learning (COL). This international organization, established by Commonwealth governments in 1988, is headquartered in Vancouver (Canada). One of its objectives is to create and improve the quality of ODL, using DE techniques and associated Information Communication Technologies (ICTs) to meet particular requirements of member countries.

Following the creation of the Southern Africa Development Community- Centre for Distance Education (SADC-CDE), domiciled at the Botswana College of Distance and Open Learning (BOCODOL), a more systematic and unified focus on research came into existence. One positive consequence of having the Centre in place was the inauguration of one of the research-based journals in the Sub Region, namely, the *International Journal of Open and Distance Learning*. The first volume hit the ODL readership market in 2007. It is noteworthy that the COL has funded the journal, which has become the active voice of research and scholarship. Put simply, the Journal captures what often was thought, but never so well expressed.

The present volume: *Open and Distance Practices in Southern Africa* is directly linked with the motivations described above, but it specifically seeks to sensitise ODL practitioners in the region and abroad of the issues at the vortex of the ODL agenda. Without clarity of awareness about such issues, any provision of education is bound to be prejudiced and dysfunctional when dispensed by practitioners who proceed under a cloud of misconceptions and half-truths about ODL. The volume's primary objective is, therefore didactic with the intention to coach and mentor practitioners on principles and procedures of open and distance learning.

Following a brief study of the state and level of expertise among DE practitioners in SADC countries, the SADC-CDE identified gaps, manifested as the hiatus between the best of intentions and effective praxis. The Directorate, at that point in time, duly recognized the gap and mooted the idea of an academic literary creation. The objective of such a publication would be to create awareness among practitioners by way of both explicit and implicit training on core ODL issues to ensure its sustainability.

Towards that end, the SADC-CDE Directorate convened a colloquium, codenamed *the Indaba*, in Gaborone (Botswana) in March 2010. It was at this convergence of professional intentions and scholarship that the idea of the ODL book was concretised. Characteristically, the participating practitioners comprised leaders and ODL intellectuals; ODL practitioners currently studying the programme Practitioner Research and Evaluation Skills and Training (PREST) in ODL; and practitioners currently enrolled for Master's and Doctoral programmes in various areas of speculation. The participants were drawn from SADC countries.

The months following the Colloquium turned out to be the busiest for contributors and the Editor alike, calling for focus and commitment to the project. In particular, the coordination function and recasting individual chapters in tandem with the house style, called for rigour, and the frequent back-and-forth movement of any single manuscript. All that effort eventuated in the present volume, whose locus in the landscape of ODL will presently receive the Editor's brief observations.

The volume represents the dynamism of expanding frameworks in the Region. This is epitomized by the convergence of insights to provide synthesis for the new creative age and urge in the Southern African ODL scenario. The chapters challenge each one of us to completely rethink what we mean by learning, teaching, and education itself. It is also noted that the individual chapters talk to the practitioner about the new learning revolution brought about by ODL to the sub region.

One of the themes transcending the chapters is the issue of *apartness* or *transactional distance*, which characterizes the learner and the taught. ODL makes this issue its strength in one typical manner. Apartness and distance train the isolated learner how to think, compared to the counterpart in a conventional classroom who operates in the comfort zone and the presence of the physical other, always ready to come to the rescue of learners.

The view expressed by Dryden and Vos (2005) is particularly inspirational for the chapters in the volume. According to these scholars, compulsory schooling began in Prussia in 1717 with teacher, chalk and blackboard. They note that today, 300 years later, conventional schools around the world still use the same cultural ritual. From this, the Editor wishes to observe that practice in ODL concedes alternative ways, and informs that provision of education cannot continue the way it was introduced in 1717 when practitioners did not know any other way of doing it. Fortunately today we do, and that is what exactly is echoed in the chapters. The volume, thus encourages practitioners to look at the potential of DE through new lenses.

We have moved with ever increasing rapidity into the World Wide Web, which has enhanced a world wide learning society. The potential of a web of interactive sharing self-learners is yet to be exploited by ODL practitioners, the audience of this volume. By seeking judicious intervention through the use of ICTs, practices in ODL have confirmed Maria Montessori's (1870 – 1952) idea that by creating the right environment, learners will become self-motivated and self-acting. The chapters in the volume demonstrate the veracity of this perception even where there are vast geographical distances and apartness.

Most importantly, the chapters argue that by continuing along traditional ways of teaching, we remain locked in a system that inevitably produces failures and inequalities. Failures and inequalities are associated with limited access to education. With all the technologies around us, it is unjust and unfair to treat today's learners as if they were yesterday's learners. Notwithstanding the potential of Information and Communication Technologies (ICTs), the volume also notes one major problem in Southern Africa, namely, scarcity of expertise in the use of technology. Even where the governments have invested millions of dollars in ICT, we still find classes of forty or more learners sitting in rows facing a teacher and a black/white board, while expensive donated computers lie unused in some store room. This is one of the challenges to which the attention of practitioners is drawn by some of the chapters.

The issues that have been referred to above, though briefly, constitute some of the ODL areas of interest objectified by the authors for the purpose of training ODL practitioners. By engaging with the volume, participants are navigated through the process of learning skills and acquiring knowledge needed in the dispensation of ODL. This is indeed training without confining practitioners to the four walls of the classroom, and what is more, it is conducted without leaving one's workstation. Now, we turn to a brief synopsis of each chapter.

Chapter 1 is preoccupied with theoretical foundations, which distinguish distance education from traditional education. Reflections on philosophical foundations enable practitioners to develop a clearer understanding of what makes ODL a discipline in its own right.

Chapter 2 draws the attention of practitioners to what is involved in setting up a new ODL institution. This is crucial for a better understanding of the task in the new ODL environments in Southern Africa.

Chapter 3 discusses the issue of staff development in ODL. As an emerging discipline, DE does not have trained professionals in place compared to conventional education, which is serviced by colleges of education and universities that train teachers.

Chapter 4 focuses on the issue of project management skills that a distance education practitioner should develop. ODL practice is essentially project oriented, and acquiring the principles and procedures of project management will enhance informed practice.

Chapter 5 is concerned with learner support issues. In DE a clearly defined and well-managed learner support system is critical for purposes of delivery, and for that reason the practitioner needs exposure to principles and procedures for more effective practice.

Chapter 6 discusses important issues of concern to both practitioners and the learners under them. These are language skills and how best to study as a distance learner. Recognition is given to the fact that distance education learners tend to be isolated compared to their counterparts in the conventional classroom. The latter can access immediate assistance from their teacher, while the former is unable to do that.

Chapter 7 shares with practitioners, especially writers of study materials, ways of coming up with up-to-standard materials. In order for qualifications obtained through distance education methodology to be credible, editing is crucial.

Chapter 8 brings into focus a theme that is often taken for granted, namely, gender in education. By drawing on experiences from different countries in the region, the writers draw the attention of the practitioners to issues that ought to be considered for purposes of democratizing ODL provision.

Chapter 9 takes up an aspect of educational provision that is considered to be the legitimate aspect of conventional education, namely, the provision of technical and vocational training. It creates practitioner awareness of what DE can achieve by providing such education via the distance education mode.

Chapter 10 refocuses the DE practitioner on the aspect of how best to write journal articles. The contributor provides practical guidance on how to go about the scholarly activity, thereby equipping DE academics with practical skills applicable to the discipline.

Chapter 11 utilises research findings to draw the attention of DE practitioners to the trends of research and scholarship in Southern Africa. Supported with statistical evidence, the chapter shares wisdom regarding how best to elevate research effort from ordinariness to higher levels.

Chapter 12 is about quality assurance in open and distance learning. Both from literature, and from experience, distance education is looked down upon as second rate education, or as education meant for failures in conventional institutions. One of the many reasons for that mindset is the poor approach to quality assurance provision in DE. The chapter, therefore, discusses procedures on how to quality assure teaching and learning in ODL.

Chapter 13, the last chapter, deals with a critical aspect of ODL provision, namely, costing. Governments and administrators erroneously think ODL can be provided anyhow without taking into account the economics of education. The chapter provides guidance on what should be considered when embarking on a distance education project.

Chapter 14 examines the critical aspect of Open and Distance Learning Management and the Law. The ideas articulated are meant to give managers of distance education some insight into legal issues, using the situation in Botswana as an example.

S. Modesto Tichapondwa
Editor (May 2011)

CHAPTER 1

The Philosophy of Open and Distance Learning: Significance for Southern Africa

S. Modesto Tichapondwa (DLitt et Phil)

(Botswana College of Distance and Open Learning)

Some Questions

1. What is the meaning of philosophy of distance education?
2. What is meant by these concepts: *distance education*, *open learning*, *correspondence education*, *independent study*?
3. What is the justification of distance education?
4. What is the significance of dialogue/conversation in distance education?
5. In what ways is distance education an industrialized form of teaching and learning?
6. What is the significance of communications technology in the provision of distance education?
7. What is the significance of the human element in distance education?
8. What are some of the quality issues worth considering in distance education?
9. What is the place of research in advancing distance education?
10. What challenges do distance education providers in Southern Africa face in the attempt to comply with the philosophy of distance education?

Introduction

Many students in any academic discipline are often discouraged by the use of words such as *philosophy*, *psychology*, *etymology*, *philology*, etc. which sound as some demanding endeavour to grapple with concepts that are mind-boggling and metaphysical, and way above the ordinary. Let me, therefore, begin by clearing this myth by offering a very simple and personalized definition of the term *philosophy*. I define philosophy as the search for wisdom. This is the sort of wisdom, in any area of human endeavour, that constitutes the foundation of all subsequent discussion and speculation about that field. Related to the present discussion, philosophy is, therefore, the search for knowledge and understanding of the nature and meaning of open and distance learning (ODL). At the core of the nature and meaning are: fundamental ideas and principles, theoretical views, the semantics of distance education (DE) terms, as well as even the beliefs that have come to be associated with DE as a discipline. According to Holmberg (2005), scholarly theories imply a systematic ordering of ideas about the phenomena of the field of enquiry. In that respect a study of philosophical foundations helps us achieve three important goals, namely:

- an understanding of the field;
- the capacity to explain issues within the field; and
- an ability to predict outcomes of intentions and activities.

Obviously, the next question that the DE student asks is: What, then, is the philosophy of distance education? This begs a further question such as: What new ideas form the foundation of ODL practices that have not been empirically dealt with by philosophers, psychologists, and sociologists of education in the landscape of time? It is true that views by Skinner, Piaget, Pavlov, and a host of other renowned educationists remain relevant even to distance education. So what is there to add

about education? Thompson (2004) rightly observes that periodically discussion revolves around the question of whether there is a need for theories unique to the field of distance education, or whether distance education is a practice that better lends itself to the application of theories from other disciplines. What is your opinion about this question? To address the matter, the present chapter covers a number of areas of knowledge.

For a moment, pause and ask yourself what sort of arguments, or topics for discussion dominate those situations where practitioners engage in distance education tasks. You will no doubt immediately mention issues like: counseling the learner, developing study materials, tutor comments on learner assignments, induction of part-time writers, managing DE projects, costing a new programme, needs assessment, content editing, and so forth. The list is endless. The point being driven home is that all these have a philosophical foundation. Some thinkers have invested time and intellect to verify empirically certain notions about DE, came out with validated results, and went on to share all that with practitioners. I am, therefore, saying that to practise on the basis of firmness and in a focused manner, an understanding of the philosophy of distance education will go a long way in guiding your career path. In particular, as we discuss issues I encourage you to relate philosophical views spawned in other cultures to the situation in Southern Africa where distance education is relatively new.

Distance Education and Traditional Education

I believe you have heard arguments about the distinction between these two types of educational provision times without number. Before reading on, let me invite you to come up with your own brief differentiation of the two.

?? My understanding of the two concepts is:

That's good. Obviously DE in comparison with conventional or traditional education is a wider system in both terms of connotation and denotation. This is because it is practiced in situations where many factors remain indeterminate and inchoate. It has many critics and enthusiasts, advocates and detractors (cf. Keegan, 1986; Roushanzamir, 2004), and therefore, remains imprecise in its definition.

Probably the best starting point in fathoming the philosophy of DE is an attempt at some definition that will form the basis for dialogue. Having given your view about the distinction between DE and traditional education, now go on to give a personal definition of distance education.

?? My definition of Distance education is:

Compare your definition with the following five by some of the scholars whose thinking has shaped current practices.

Moore (1973)

Distance education is a family of instructional methods in which the teaching behaviours are performed apart from learning behaviours, including those that in a contiguous situation would be performed in the learner's presence, so that communication between the teacher and the learner must be facilitated by print, electronic, mechanical, or other devices.

Peters (1973)

Distance education is a method of imparting knowledge, skills and attitudes which is rationalized by the application of division of labour and organizational principles, as well as by the extensive use of technical media, specially for the purpose of re-producing high quality teaching materials which makes it possible to instruct great numbers of students at the same time wherever they live. It is an industrial form of teaching.

Wedemeyer (1977)

Distance education consists of various forms of teaching-learning arrangements in which teachers carry out their essential tasks and responsibilities apart from one another, communicating in a variety of ways. The purpose is to develop in all learners the capacity to carry on self-directed learning, the ultimate maturity required of the educated person.

Dohmen (1977)

Distance education is a systematically organized form of self-study in which student counseling, the presentation of learning material and securing and supervising of students' success is carried out by a team of teachers, each of whom has responsibilities. It is made possible at a distance by means of media, which can cover long distances.

Holmberg (1981)

Holmberg defines distance education as that kind of education, which covers:

The various forms of study at all levels which are not under continuous, immediate supervision of tutors present with their students in lecture rooms on the same premises, but which, nevertheless benefit from the planning, guidance and tuition of a tutorial organization.

?? Now, read all the definitions carefully and list what you consider to be the outstanding characteristics from each one in the space provided.

Obviously, there are many of these, including:

- distance between teacher and learner,
- use of multimedia,
- the notion of division of labour,
- self-study,
- separation of the learner from peer group, etc.

Please grasp as many of these as possible since they are the defining philosophical characteristics of the discipline under study. It is, nevertheless, important to note the fundamental feature that distance education is a mode, which does not require the physical contiguity of the teacher and learner at all times.

Clarification of terms

There are a number of terms, closely related to the definitions, which you ought to be familiar with. For example, what distinguishes distance education from correspondence education?

Distance education replaced the earlier term *correspondence education* at the Twelfth World conference of the International Council for Correspondence Education, held in Canada in 1982 (cf. Koul *et al.*, 2006). Since then, the Council was renamed the International Council for Distance education. The distinction between these two modes lies in their aims, methods, and orientation. Correspondence education is an extension of conventional education in-so-far as it imparts prescribed knowledge for the issuance of certificates. It depends mostly on printed materials distributed by post. DE education is known to be open.

Open education can be defined as a system of education that does not operate through traditional conventions (cf. Gunawardena, 2004). As an example, open education is not restricted to the four walls of a classroom. Distance education is, therefore, said to be open because it is relatively free from restrictions such as administrative restrictions, attendance restrictions, age restrictions, restrictions on the mode of didactic communication, to name but a few. In discussing the philosophy of DE, it is acceptable to use the notions of *distance education* and *open education* synonymously. This is because the distance education mode allows the educational systems to be open, and the openness of education systems suits the promotion of distance education.

From its foundation as an educational system, distance education has been described in different terms, depending on a particular country. For example, in Australia, the term *external studies* is used. In North America, the term *independent study* is often used, while the term *home study* has become localized mainly in Europe. This is probably because of the influence of Swedish schools of correspondence courses. Last but not least, is the term *off campus studies*, which denotes a contrast with the on-campus traditional type of studies. The expression ‘off-campus studies’ is in vogue in the Pacific Region, that is, Australia and South –East Asian countries.

What about in Southern Africa? Is there a term that is commonly used in place of ‘distance education’? I cannot think of any except the widely shared misconception evident in discussions when people use the more familiar but inaccurate term ‘correspondence’ to refer to long established distance education systems represented by institutions such as the University of South Africa (UNISA), or the Botswana College of Distance and Open Learning (BOCODOL). It is also fairly common in Southern Africa to hear people talking of *long distance education*. This is most probably because of the common use of the expression ‘long distance buses’, which ply the many routes of our region.

When referring to DE institutions, the terms *single mode* and *dual mode* are commonly used. The former refers to an institution exclusively devoted to either the provision of distance or conventional education. A good example is the Zimbabwe Open University (ZOU). The latter term refers to an institution that offers both educational alternatives. Many of our institutions in Southern Africa follow this mode. The normal practice is that while the core business of the institution is the provision of conventional or traditional learning, there often is a department that offers DE courses. A good example is the University of Botswana where the Centre for continuing Education (CCE) offers distance programmes. Reflect on the philosophical concepts discussed above by working on this activity.

?? Re-examine the terms discussed above, and:

- a. Establish the extent to which some of them are used by institutions in our region.
- b. In which cases do you think the use of alternative terms helps in the better understanding of distance education?
- c. Cite examples of single mode and dual mode institutions you are familiar with.

In response to the first question it has been noted that in Namibia, there is the Centre for External Studies, while at the National University of Lesotho there is the Institute of Extra-mural Studies. These are DE organisations being referred to but using alternative terminology. Single mode and dual mode institutions will be numerous from your experience, so you name them and share with peers.

Justifying Distance Education

From the foregoing reflections, the philosophical assumption is that all learning does not depend on teaching. People learn from the time they are born until surprised by death. It is important to recognize that doubts have been expressed about the nature of DE and its true efficacy. The democratic nature of distance education is probably its most important distinguishing aspect, which justifies its pursuit. This view is well defended by Koul *et al.* (2006).

There is transparency in both what the tutor/lecturer does and in the compilation of study materials. What a lecturer says as part of his/her oral and spontaneous communication within the classroom is in many ways private, and is not subject to challenge or scrutiny. Normally, it is restricted to a definite and small number of persons, and cannot be captured in any medium for review or revision.

On the contrary, information communicated in a distance education study programme is something that is open to public inspection. Study materials, for example, can be publicly criticized, reviewed, and revised periodically. The materials then reach a wide range of customers without taking into account age, location, or distance between the institution and the targeted learner. We can, therefore, conclude that the democratization of the educational process is achievable in some measure by the process of distance education. At least, from practice and from surveying seminal literature on the discipline, we are able to identify the various distinct lines of thought on the issue. To share your personal views, work on the next activity.

?? In your opinion, to what extent has distance education democratized the educational process in Southern Africa?

Distance education has opened opportunities for out-of-school youth and adults by increasing access to education.

Independent Study

Charles Wedemeyer (1977), former professor of education at the University of Wisconsin, Madison, developed the theory of *independent study*. He popularized the expressions: *independent study*, *open learning*, and *distance education*. Central to the three notions is the concept of learner autonomy, that is, the learners study independently in their own environment that is free from the restrictions of classrooms. That way, they develop a capacity and maturity that enable them to carry on self-directed learning.

Wedemeyer also introduced the notion of *continuing education* as one of the purposes of independent study. His argument is that factors like geographical remoteness, poverty, or any psychological conditions prohibitive of institutionalized education should not in any way prevent an aspiring learner from achieving his/her educational goals. The immediate pedagogical implication of such a philosophy is that we look for unorthodox means and modes of educating all those who are willing to be educated. One such means is distance education that brings education to one's doorstep. Further implications of this philosophy are that DE necessitates a change in the culture of doing things by both the teacher and the learner. The learner has to be counseled on how to take on responsibilities and roles, which traditionally did not belong to him/her. Similarly, the teacher will have to assume new roles, e.g. abrogating the practice of making unilateral decisions about content to be learnt and methods of presentation. In preparing study materials, he/she will have to work as part of a team.

Dialogue and individualization

Michael Moore (1981) worked as a senior counselor of the British Open University and contributed immensely to the philosophy of independent study. For Moore, independent study describes all such educational transactions distinguished from what he calls 'the school environment'. This is characterized by variables of distance, apartness, and learner autonomy. He identifies two defining characteristics of autonomy, namely, dialogue and individualization.

Dialogue is broadly interpreted as an expression of academic interaction aimed at promoting meaningful learning. It may take place in face-to-face situations, telephone, correspondence, or through computer-assisted instruction.

Individualisation, on the other hand refers to the manner in which study material is structured. A programme is individualized when the curricular components, namely, objectives, methods, materials, and evaluation are determined with the learner profile in mind. Thus Moore uses the notions of dialogue and individualization to define 'distance'. He argues that the actual distance between the learner and the teacher/institution should not be measured in terms of the spatial distance between the two, but in terms of the degrees of dialogue and individualization, which the academic programmes offer. Moore and Kearsley (2005:223) reaffirm this position when they

say, “transactional distance is the gap of understanding and communication between the teachers and learners caused by geographic distance that must be bridged through distinctive procedures in instructional design and the facilitation of interaction”.

Regarding *learner autonomy*, the traditional educational system thrusts upon the learners what they should learn in a top-down model. The institute and the teacher prescribe the line to be followed. When DE programmes are considered, the guiding principle is that they are, to a large extent, learner determined. A programme is learner-determined if its objectives, methods, materials, and evaluation are determined by learner needs. It is through dialogue, characterized as the discourse of learning (Tichapondwa, 2007), that pedagogic intentions are attained. The assumption is that both teacher and learner realize there is purpose in engaging in the discourse of learning (inter-mental interaction). In turn, this leads to intra-mental interaction as the individual engages in dialogue with the study material. Let us reflect on the foregoing in this activity.

?? To what extent does each of the following notions influence DE practices in your organization?
a. independent study
b. dialogue
c. individualisation

For a more appropriate response to the activity, you should closely re-examine the conduct of distance education in your organization, then measure practice against the three concepts. As an example you may want to review the study materials used by your students, and evaluate the extent to which dialogue is consciously exploited to foster clearer understanding, as well as how individuals are cajoled into active participation through appropriate discourse.

An industrialized form of teaching and learning

There is a philosophical stipulation that may sound out of place that was proposed by Otto Peters (1973), the first vice chancellor of Fern University (in the former West Germany). His philosophical position is based on the hypothesis that highly developed industrial societies have generated a vast variety of needs for education. Thus, by its very nature, distance education is industrial. Following a survey published in his book: *The Didactic Structure of Distance education*, Peters concluded that distance teaching/ learning was an industrialized form of teaching and learning. This view has been widely supported by scholars (e.g. Bernath and Vidal, 2007). Peters defends his theory by outlining some industrial characteristics of distance education.

The first is what he calls *division of labour*. He observes that the production of teaching materials for DE is an industrial process that requires a range of experts to accomplish. These include writers, content editors, language editors, graphic designers, printers, etc., who work along industrial lines to produce materials to be used in ways different from those that are used to learn from conventional textbooks. The basic industrial principle involved here is ‘division of labour’. The same principle is applicable to other processes. For example, those who write study materials are not the ones who do the teaching. Those who deliver study materials to specific

destinations have nothing to do with how the materials are used. Similarly, course evaluators might be professionals who were involved in neither the writing nor the teaching. Essentially, therefore, each activity is taken care of by a specialist.

The second is *mass production of teaching materials*. Clearly, this is a phenomenon of industrialization. Parallels are identifiable between industry and distance education. For instance, the growth of industry is seen from individual cottage labour to group effort, and manufacturing has moved to mass production in order to meet the ever-increasing demand for commodities. The same applies to the emergence of distance education. Industry has moved through simple mechanization to automation and computerization, and so has DE (cf. Hoffman, 2004).

The third is *systematization of work procedures*. There are identifiable parallels between the input and outcomes of industrialization and those of distance education. For example, it has been realized that as in industrialization, in distance education too, success depends on a large measure on:

- planning;
- formalisation of procedures;
- standardization of products;
- systematization of the overall process; and
- centralised decisions before decentralisation.

Benathy and Jenlink (2004) discuss this issue at some length confirming that all these lead to quality products and quality delivery of services.

The fourth is *layout of workplace*. There is some similarity between buildings meant for industrial purposes and the campus for an open university. In both situations the structures are similar in the sense that there are separate sections for design, production, dispatch, and that the role of DE teachers is similar to that of managers in industry who manage teams for specific tasks. The opposite is true for conventional universities or colleges. Reflect on the philosophy of industrialization by working on this activity.

?? What do you consider to be the pedagogic importance of Peters's philosophy on distance education practices in your institution or in institutions in Southern Africa?

There is no single correct answer, but what comes to mind is that division of labour is a concept that individual institutions do not readily come to terms with. It calls for systematic staff development of practitioners who are more used to conventional teaching. Systematisation of work procedures recalls the need to engage in planning at a level much higher than is often done in a school environment. Little is achieved in DE organisations when there is limited planning. That is why ODL organisations are more into planning meetings than is normally the case in conventional schools. Massification of materials implies that educational communication is broken up into components e.g. print, audio, telephone, internet, etc. as opposed to oral interaction that typifies conventional schooling.

Guided didactic conversation

Borje Holmberg (1981) echoes Moore's view about dialogue as an integral part of successful distance education praxis. Holmberg started his professional career as a lecturer in English, and through independent study managed to elevate himself to professor of distance education at Fern University. His philosophy was premised on the view that a distance education learner who is engaged in self-study is not a loner. He/she has a whole team in support, namely, administrators, writers, media specialists, teachers, evaluators, counselors, etc. The essence of the support is to build an academically fruitful relationship between the individual learner and the supporting institution. This relationship, according to Holmberg is characterized by what he calls *guided didactic conversation*. According to Holmberg, indirectly, conversation is brought about by the presentation of study matter, and this one-way traffic causes students to discuss the contents with themselves. The conversation is both real and simulated. Simulated conversation is internalized conversation caused by the study of a text. Ultimately this brings a close relationship between the course developers and the students, created by an easily readable style of presentation and the personal atmosphere of the course. This kind of style, apart from promoting individual dialogue, also accounts for the purposefulness of face-to-face tutorials where elements of conversational appropriateness are exploited towards the guided construction of knowledge. In that situation, the tutor and tutees will be engaged in problem solving.

The contribution I make to this important debate about Holmberg's didactic conversation is that during face-to-face distance education tutorials, collaboration between the tutor and the learner eventuates in effective learning (Tichapondwa, 2008). Firstly, I examine constructivist theory, which explores how particular sorts of lecture room discourse carry knowledge, and recognise the role of language as a means of constructing knowledge and understanding (Mercer, 1995:4). According to this theory, knowledge is socially constructed, meaning that the study of learning as an individual process involves talk as a joint activity. Learning is, therefore, conceptualised as a sociocultural collaborative activity (mediated through language) in which the distance education tutor provides support to the learner so that he/she can eventually stand on his/her own. Mercer (2004:139) has made the following observation regarding how thinking is based on ways with words:

A sociocultural perspective highlights the possibility that educational success and failure may be explained by the quality of dialogue, rather than simply in terms of the capability of individual students or the skill of their teachers.

The origins of the sociocultural perspective are mainly in the work of Vygotsky (e.g. 1978), which treats communication, thinking and learning as related processes. Lecture room interaction practices are considered from the point of view of active engagement, theorised as a requisite to interaction and learning. In the interpretation of Vygotsky's (1978) theory, neo-Vygotskians such as Mercer and Sams (2006:508) have claimed that social involvement in problem-solving activities is a crucial factor for the development of individuals. As they put it, "inter-mental (social) activity – typically mediated through language – can promote intra-mental (individual) intellectual development". This claim has been widely accepted by researchers in the field who recognise the crucial role of the tutor. In a related study Edwards and Mercer (1987:5) observe that the tutor's questions, clues and prompts are used to

achieve “insights that the students by themselves seemed incapable of”. Constructivist theory thus invites us to consider how the conversations, which take place in and around learning activities constrain or extend the intellectual potential of individual DE learners.

Comments on tutor-marked assignments

John Baath (1980) has made an important contribution by propounding the philosophy behind comments by tutors on the assignments they mark. Baath’s name is mainly associated with the concept of *two-way communication in distance education*. His argument is that a distance education tutor could stimulate the student to most remarkable improvements by means of constructive criticism, encouragement, and personal involvement in the student’s learning problems.

Tutor comments come in as a link in a chain of two-way communication initiated by the distance education institution through:

- i. the course materials;
- ii. the assignments and submitting them for assessment;
- iii. the assessment made by the tutor; and
- iv. the reaction of the learner in response to the assessment.

Our interest in Baath’s philosophy lies essentially in his emphasis on the pedagogic significance of tutor comments, which form the crucial link in the two-way communication in DE. Baath added to this by building in some kind of two-way communication within study materials in terms of self-check exercises, detailed model/specimen answers, and in-text questions, which I refer to as embedded support devices. Express your personal views on the issue by reacting to this activity.

??

- a. Suggest any four specific roles that you think language plays in promoting learning.
- b. How is conversation linked with collaboration between the tutor and the learner?

Language plays a wide range of roles, including being the vehicle through which ideas are communicated. Language also represents concepts that are central to acquisition of knowledge in a given discipline. Talking about collaboration, that is, purposefully working together, it is through exchange of ideas and opinions that meaning is created towards achieving learning goals.

The Human element in distance education

This philosophical aspect deals with the significance of the human element in tutorial services. David Sewart (1980) premised his argument on the assumption that the crux of distance teaching is a continuity of concern for the student learning at a distance. As noted earlier, DE institutions provide mass education to hundreds/thousands of learners. One wonders whether the package of materials can perform all the functions normally performed by the teacher, on the one hand, as well as cater for the vast variety of the needs and idiosyncrasies of distance learners on the other. Sewart posits that however sophisticated the design and vast the reach of such material may be, the learner will always need additional human support. This can actually match the infinite variety of problems that non-contiguous teaching/learning give rise to. For

that pedagogic reason, distance education has added the human voice through what has come to be known as face-to-face tutorials. The face-to-face element is regarded as a legitimate constituent of DE like all other media (cf. Tichapondwa and Tau, 2009). This elevates DE to a higher level than correspondence education, which depended mainly on postal communication. The human element, as Moore (2007) observes, reduces transactional distance significantly.

Some of the philosophical ideas discussed so far can be summarized as follows.

Distance education: thinkers and theories

Name	Major theoretical contribution
Charles A. Wedemeyer	Independent study Continuing education Open learning
Michael G. Moore	Distance a function of dialogue and individualization Learner autonomy
Otto Peters	Distance education: an industrialized form of teaching and learning
Borje Holmberg	Guided didactic conversation
John A. Baath	Significance of two way communication
David Sewart	The human element in an industrialized form of learning and teaching

Emerging operational concerns of distance education

The concerns discussed in this section have become closely associated with the philosophy of distance education.

1. Communication Technologies

Many of the problems posed by physical distance and communicational barriers of earlier phases of DE have been solved by the growth of technology. The philosophy is that what face-to-face education can do, distance education can also do. With the arrival of the e-mail, internet, tele-conferencing, etc. the basic assumption about teaching/learning has been drastically altered. The virtual classrooms and the virtual universities have freed students from the obligation of sticking to particular timings and places even within the same campuses. Scholars (Hoffman, 2004; Dekkers, 2000) agree with this position in their discussion of the importance of communication technologies in distance education. Such technologies have the capacity to annihilate distance.

If communication technology can be defined as anything that helps interaction, then, modern communication technologies such as the satellite based tele-communications, and the computer technology are the most interactive media that the world has ever seen. That is why in our discourse of open and distance learning, the issue of communication technologies has become a philosophical point of reference.

2. Networking

Without any doubt, networking has become a household philosophical concept in distance education institutions. *Network* is a technical term used in computer sciences to mean a chain of interconnected machines and operations. In simple language it

means any complex system with numerous points of contact connected together. When applied to a distance education system, it refers to an arrangement in which learners and tutors are linked together through the means of computer communication for purposes of interaction.

Networking is closely linked with the notion of *collaboration*, which refers to a conscious decision to cooperate with each other to promote active learning. In Southern Africa collaborative practices among distance education organisations are well documented (cf. Tichapondwa and Tau, 2009), and new efforts continue to be developed. Collaboration has led to quality provision of distance education. A few examples can be cited:

- Annually, DE providers in SADC hold a conference under the aegis of the Distance Education Association for Southern Africa (DEASA). At this forum crucial issues related to ODL are discussed, but the highlight of the conference is the presentation of papers to share insights in the field.
- Institutions collaborate in quality assurance. There is a protocol, for example, between BOCODOL and the Namibia College of Open Learning (NAMCOL) for peer review. The institutions reciprocate in reviewing systems, policies, and procedures with the view to improving praxis.
- The SADC Centre for Distance Education (SADC-CDE), domiciled at BOCODOL, spearheads research which has eventuated in the annual publication of the *International Journal for Distance Education*.
- The SADC-CDE, in collaboration with the Commonwealth of Learning (COL) has developed the Practitioner Research and Evaluation Skills Training (PREST) in open and distance learning. This is a postgraduate certificate course offered to participants from SADC countries as a way of enhancing professional approaches to distance education and research.
- Institutions exchange programmes and quality assure implementation and delivery of such programmes.

?? Explain the importance of networking and engaging in collaborative practices at your institution.

There is no standard answer to this question. You are expected to come up with observations regarding your institution, then share these with peers.

3. Quality issues

Closely following the dynamic developments in the communication technologies in DE, issues related to quality inevitably arise. When juxtaposed with conventional qualifications, reservations have been expressed about those diploma and degree qualifications awarded by distance education colleges and universities. To effectively counter the charges against DE as second-rate education, it is necessary for distance education practitioners to demonstrate that it is second to none. Recognition should be taken of the fact that distance education is prone to more rigorous public scrutiny than its face-to-face counterpart. Because of its wider jurisdiction and the heterogeneous student profile, DE has a wider public presence and, therefore, greater social

accountability. It can fulfil these obligations through quality assurance in its academic content and delivery service.

Quality is an industrial term that is commonly used to refer to the degree of excellence and standard of products or services that a DE institution offers (cf. Bernath and Vidal, 2007). Broadly, quality means: fitness for purpose. It is difficult to confirm for certain the extent to which distance education institutions in Southern Africa have committed themselves to quality. From the philosophical standpoint, quality assurance is considered inseparable from all processes that characterize distance education. This is by no means easy to accomplish given DE contexts where there is a range of complex factors and variables related to processes of human thinking, perceptions, attitudes and abilities that come into play.

4. Research

Research is an aspect that is closely related to quality issues, and is an aspect of distance education philosophy that is increasingly talked about at workshops and conferences in the SADC Region. However, it is one thing to talk about research, and quite another to give it the attention it deserves. It is a fair observation to make about our region that research has not received the attention it deserves, if by attention we mean allocating funding to research as a way of raising it above mediocre studies that are too localized and lack cross-cultural validity and reliability. It is through research that we make positive inroads towards making distance education an acknowledged discipline.

Experience has shown that the contributions from SADC region are not only fewer in number, but also qualitatively wanting. Most contributions stop with case studies and descriptions of how well institutions conduct business sprinkled with anecdotes whose value is limited. One can argue that there is need for clear research policies to guide progress. Mishra (1998) echoes a similar view in his discussion of research in India and other developing countries. Building on this, Tichapondwa (2010) conducted a research in Southern Africa and noted four general concerns as evidence of trends in DE research, namely,

- focus on a limited number of areas of research priority;
- a weak methodological base that is largely descriptive, and focusing mainly on institutional problems;
- the scarcity of experimental research; and
- the lack of theoretical grounding.

These trends led to the formulation of the theory of ordinariness, applicable to any research where the quality of excellence is compromised because of the prevalence of the four characteristics listed above.

?? How are the issues of quality assurance and research addressed in your organization?

Approaches will vary from one organization to the next. One way is to expose staff (e.g. managers) to basic training about quality assurance. When they have received

the training, they will be able to cascade it down to those professionals they supervise. Concerning research, it is needful that an institution devotes some funding to research, and that this should be based on some policy. It is a fact that many of the institutions in the region neither have a policy in place, nor a budget for research. In the absence of this, it is not far-fetched to observe that unless tackled systematically, research in distance education will remain at a primitive level.

Challenges with the philosophy of distance education

In this concluding section we aim at highlighting some of the constraints that distance education providers face in their attempt to comply with philosophical ideas discussed above.

- a. One of the challenges, insignificant though it might seem, is the lack of understanding by practitioners that distance education has unique features that distinguish it from conventional education. This challenge is often felt when somebody is appointed to play a role in DE when he/she has training for conventional set ups. Such a person takes DE for granted, but along the way makes so many blunders as a result of misinformation, having the wrong attitude, and failure to change the mindset. The need for systematic induction and staff development cannot be overemphasized.
- b. There is a hype and excitement about communication technology. It is true that technology reduces distance between interlocutors quite considerably, but it is also true to say many developing countries like those in our region, can ill afford access to computers, mobile phones, the internet, etc. for a whole range of reasons. There are highly qualified people who cannot use the internet, and even in some universities it is not unusual to find a whole department queuing for the services of one computer controlled by the departmental secretary. What about students who live in remote areas where there is no electricity? What appears to be a major communication breakthrough in DE is a solution confined to those societies and nations, which have easy access to technology.
- c. In our region there still exist serious misconceptions about what distance education can do. Our communities are still ensnared in the admiration and reverence of the established order because that is what they know best. Parents would rather send their children to established universities than take them through distance education institutions regarded as second rate with sub-standard qualifications. This is notwithstanding all the philosophical positives debated above.
- d. Staffing can be a serious challenge. To begin with, there is limited expertise in the area. To compound the issue, DE depends on part-time tutors, content editors, writers, and so forth. These are full-time employees elsewhere, and testimonies from institutions have shown that the level of commitment from such staff can be variable to the extent of adversely affecting service delivery. Too often one comes across disgruntled learners who rightfully complain about poor study materials, comments that are of limited help, non-attendance by tutors at face-to-face tutorials, etc.

- e. Visits to study centres of a given institution often confirm that students are averse to what is extolled as learner-centredness. They prefer tutors to give lectures, while students take notes. This is a syndrome of the conventional schooling to be properly perceived as a challenge in DE. This has remained a difficult problem to tackle, especially that it leads to a high drop-out rate for enrolled students.
- f. Distance educators also often highlight shortage of time as a very serious challenge. To do a good job in training writers on how to prepare study materials, or give induction to tutors on how to conduct tutorials or mark assignments requires time. In the majority of cases, there is very little time to do that. In some cases, a person is trained for a day, and is expected to become an accomplished DE practitioner. It does not work that way. This problem has defied conclusive solution in many institutions.

There are many challenges that frustrate best intentions to comply with philosophical ideas. Add some from your own experience by working on this activity.

?? List any two challenges associated with compliance with distance education best practices.

Challenges will vary from one institution to the other, so what you come up with will be unique to your circumstances, but also most likely generalisable.

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CHAPTER 2

Setting Up a New Open and Distance Learning Institution

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Some Questions

1. What factors should be taken into account when setting up a new ODL institution?
2. What is the general educational background of countries in the SADC Region?
3. What are the characteristics of a new ODL institution?
4. What influence does a national policy on ODL have on setting up a new institutions within a given country?
5. What procedures should be followed when setting up a new institution?
6. What quality issues should be considered?
7. What areas need to be managed in the process of setting up?
8. What are some of the challenges to be taken into account?

Introduction

The introductory chapter will, *inter-alia* touch on the place and legitimacy of ODL, then proceed to guide the practitioner on setting up an ODL institution. This will be focused on environments where distance education is increasingly coming into existence.

The Background

Countries in the sub-region, e.g. Botswana, Zimbabwe, Angola, Swaziland, etc. are no different from the rest of the developing world where the aspirations and wishes of leaders and their citizens to be equal and contributing partners to global development is heavily reliant on well functioning educational systems. However, unlike other parts of the globe, the gap between supply and demand for education is unfortunately huge and continues to increase. The gap permeates all sectors of education from primary through secondary, tertiary and continuing education. Citing Botswana as an example, school attendance rates are estimated at 90% for primary school level, 50% at junior secondary level, 20% at senior secondary and 11.4% at tertiary level (Vision Council:2009). Average rate of school attendance in continental Africa, is said to be 81% at primary level, 34% at secondary level and 6.5% at higher education level. For sub-Saharan Africa, the average rate of higher education attendance is as low as 4%

against an average of 10% attendance rate in all developing countries (cf. Murphy *et.al.*, 2002). The tertiary enrolment rate of 11.4% in Botswana, even though higher than that of both sub-Saharan Africa and continental Africa, is undoubtedly an under-achievement or under-performance when viewed against the tertiary enrolment rates for Asia, Arab States and Latin America, which stood at 10%, 15% and 18% respectively in 2003 according to Dhanarajan and Kanwar (2003) and Saint (2003).

?? Reflect on the situation in your country, and:
a. Establish the statistics on the extent to which institutions offering conventional education are able to meet the demand for education.
b. What role do you think new ODL institutions can play in increasing access to further education and training?

This undesirable situation, which is compounded by the declining economic performance of our countries seriously challenges both governments and institutions to develop and implement innovative educational solutions that would allow for increased accessibility by many more people without compromising the quality of educational programmes. ODL has become a recognised and viable alternative. To effect it in any given country requires agencies, and among such agencies are institutions, functioning as dedicated providers. In our sub-region a number of instances readily come to mind, for example, Malawi College of Distance Education (MCDE), Namibia College of Open Learning (NAMCOL), Botswana College of Distance and Open Learning (BOCODOL), Zimbabwe Open University (ZOU), University of South Africa (UNISA), Open University of Tanzania (OUT), to name a few. In line with the theme: *Guiding practitioners in distance education praxis*, it becomes imperative to share ideas on how to establish a new institution against a background where there are providers of conventional education already in place.

Fundamental Questions

Guided by the above-stated mode of thinking, what guidance will those tasked with setting up a new institution require? Modesto and Tau (2009:32-33) have simplified the guidance by drawing the attention of planners to these questions:

- What will be the core business of the institution?
- What level of the education system does the institution focus on?
- How is the institution going to be funded?
- What funding is required?
- What resources are required? These should include physical, ICT and human resources.
- What are the provisions of the national policy of ODL regarding establishment of an institution?
- Who are the stakeholders to be taken into account?
- Who are the competitors in the country?
- What organisational structure should the new institution take?
- What quality assurance mechanisms should be put in place to ensure the institutional objectives are met?

Work on the following activity in order to reflect on the foregoing.

?? Suppose you were a distance education practitioner tasked with setting up a new institution. Why do you think it is necessary to have clear answers for each of the ten questions posed above? Relate your answers to the circumstances you operate in.

The responses will vary from one situation to the other, but the important point is that a thorough response to each question will define areas and reasons for acting in a certain manner when setting up an institution.

Factors that influence the setting up of an institution?

This part of our discussion answers the key question: Why start an ODL college or university? In answering the foregoing questions, it is quite clear that establishing an agency for ODL has to be rationalised. There must be a reason for you and planners to go to the trouble of: specifying whether the institution will offer secondary school, vocational, or tertiary programmes (its core business); establishing how the project is going to be funded; clarifying how it is going to be structured, etc. It simply means you and your team will be driven by certain imperatives. Talking about challenges in setting up comparable agencies in Switzerland, Burgi (2009) suggests a number of factors the ODL practitioner should take into account, and these include:

- the demand for education in the country;
- the socio-economic situation;
- the political climate;
- the national policy on education;
- the manpower requirements;
- the type of institution (whether single or dual mode);
- the level (whether pre-tertiary, tertiary, or vocational); and
- the competition.

I shall examine some of these factors in some detail later, but for now suffice it to say that these imperatives are generic and applicable to any of our countries in the sub-region. Heldeberg (2008:177) further confirms that there are certain principles applicable cross-situationally that guide systematic establishment of ODL entities.

For ODL to be of value and be meaningful to those who enrol in it, policy makers, education planners and institutional leaders have to take note and be sensitive to certain issues and needs. As advised by Dhanarajan and Kwanwar (2003) such issues and needs include but are not limited to the following:

a. Programmes

- When providing courses and programmes through open and distance learning, the institution should establish standards and encourage academic integrity equivalent to courses offered in traditional campus-based environment.
- Programmes should be evaluated and assessed regularly for quality.

- Programmes should have contextual relevance and be informed by market research and learner needs.
- Programmes should be taught through well-conceived and packaged ODL materials, which replace the teacher, classroom and textbook. The materials should thus:
 - provide content to be learnt
 - have a fair and appropriate mix of media
 - structure the content into learning sessions
 - help students decide which parts to use and when
 - provide activities to help students learn content and apply it
 - provide feedback to learners, to help them learn from their mistakes
 - motivate students
 - help students to develop study skills essential to individual learning
 - provide a means for students to assess their progress.

To ensure consistency across programmes and courses in terms of how they are developed and packaged by various material developers in the institution, there will be need for an agreed house style guide that outlines procedures, standards and stages of material development.

The institution should have a well-conceived policy to guide decision-making regarding when to buy, develop or adapt learning materials.

b. Providing Effective Student Support:

Though students are expected to study independently, they need to be supported as they study. Well-designed materials cannot substitute for a well-structured student support system essential for good distance education provision. Students need study materials on time, timely feedback and advice, access to resources and someone to observe and comment on their work. They need support that comes from interacting with other students. Lack of support leads to frustration emanating from isolation and this may in turn lead to attrition. It seems sensible for institutions offering distance education to establish a network of learning centres through which distant learners may be offered support. Such centres need not be owned by the institutions but they could be accessed through some collaboration arrangements made with their *bonafide* owners.

c. Assessment of Student Success:

A significant challenge faced by all ODL providers has to do with assessment of students' progress. In conventional settings, instructors can monitor students' progress on a daily basis, note their reactions as they work through their course materials and provide timely and meaningful feedback. This situation is difficult to reproduce in distance education settings. Lack of regular monitoring and effective feedback may result in de-motivation and attrition, leading to low completion rates and loss of the initial benefits of economies of scale realised through larger enrolments. Regardless of how students are monitored and assessed, ODL students

must be able to demonstrate a comparable level of achievement to that of their counterparts in conventional programmes. Among other innovative ways of monitoring students' progress, some institutions may want to explore the use of technologies such as audio conferencing, video conferencing and the internet, provided resources permit and digital divide is not much of an issue.

d. Shifting Costs From Institutions to Learners:

The call for cost effectiveness and cost recovery has intensified for many if not all education providers in the SADC Region. As a result, a lot of input costs e.g. appliances' costs, connectivity costs, software costs may be shifted to learners. Whilst there is merit in cost sharing, if providers of ODL are not mindful, yet another barrier to educational access may emerge and counter the very noble efforts made towards expansion of access.

e. Collaboration, Cooperation and Partnerships:

The practice of ODL offers enormous opportunities for the development of collaborative arrangements at many levels. The sharing of knowledge, the linking of technological assets, the development and sharing of resources and learning materials as well as learner support systems, all provide strong foundations for building strategic relationships and partnerships between institutions and organisations. A successful in-country example is the Namibian Open Learning Network through which University of Namibia, Namibian Polytechnic, Namibian College of Open Learning and their Ministry of Education share facilities and expertise for the benefit of their respective off-campus learners.

f. Leadership to Manage Change:

ODL requires sound management and leadership capable of managing and initiating change. As the environment for ODL changes, there will be mounting pressure on institutions to respond to this change. One cannot help but agree with Charles Darwin that "It is not the strongest of the species that survive, or the most intelligent, but the one most responsive to change".

g. A Clear Purpose for Applying New Technologies:

Driven by the desire to bridge digital divide, educational planners in many institutions follow the technology path regardless of how it can be used to enhance access and enrich the teaching and learning process. Technology by itself cannot unfortunately perform miracles, what it requires is imaginative and creative applications rooted in ground reality and sound training. ODL providers need a cautious and considerate approach for inducting appropriate technological solutions. Wholesale and instantaneous shift to e-learning and on-line learning could marginalize the very people we want to bring on board through ODL.

h. Investment in Staff Training:

Organising and running ODL programmes require staff members that are skilled in various aspects and facets of the field. There has to be an upfront investment on staff training if ODL is to succeed. This is especially so with institutions that may opt for a multi-media approach to distance education. Appropriate and efficacious training is essential if our institutions are to catch up with the quality of ODL programmes offered in other jurisdictions. If institutions in this respect are to achieve “parity of esteem” and recognition, a “parity of quality” would necessarily have to be assured.

i. Unequivocal Institutional Commitment:

The foregoing needs and issues call for absolute commitment of any institution desirous of providing ODL in a sustainable manner. An absence of institutional commitment leads to all kinds of bad practice, from poor quality course materials to the absence of learner support and a total neglect of the students outside the campus.

j. National Policy Framework:

Unequivocal institutional commitment will depend to a very large extent on the commitment of Government to the provision of ODL. Commitment by Government has to be underpinned by clearly enunciated national policy on ODL. With this policy in place, providers would be assured of the much-needed support. It is thus proper for institutions willing to meaningfully embrace ODL to engage Government authorities in a bid to sway them towards enunciation of robust ODL policies. After all, the existing education policy frameworks have little to show for ODL. Whilst some regional education policies pronounce on structures and programmes’ provision at various levels, they fall short of other critical tenets of contemporary ODL, hence the perpetual jaundiced attitude preferred against ODL, which is otherwise a cost-effective and efficacious method of education and training delivery. It is baffling to this day that whilst national plans project a gloomy future economic outlook for the SADC Region and the need to be cost effective in our service provision; we have not fully realised the need to substantially capitalise on the obvious benefits of ODL, particularly for in-service programmes. One cannot help but to conclude that this has not happened because there is an apparent absence of comprehensive national ODL policies, which could have guided authorities in the allocation of our otherwise scarce resources.

?? Ten issues to be taken into consideration have been discussed above.

a. Identify any four, which you think are critical in setting up an ODL institution in your country.

b. Explain why you think each one of your four issues is critical.

With reference to countries in the SADC region, it is difficult to single out any issue that is less critical. However, circumstances in different countries will vary, so the choice you make will be in accordance with your context. Equally, the explanation you make should be addressing the situation.

Procedures

In the present section, some of the factors raised above will be singled out for discussion. Central to setting up an institution is the need for careful planning. All procedures will, therefore, be based on careful planning and management. Recently, King, Mallet and Bates (cited in Hope and Guiton, 2006:52) define management by singling out three features. The first involves the capacity of the system to endure over time. The second is cost effectiveness, and the third is the value position, that is, whether what the institution seeks to do through the distance teaching system continues to be worth doing and is defensible by reasonable argument.

Appleby's (1982) view has remained relevant to date. He is of the opinion that management is made up of four functions, namely, planning, motivating, organising and controlling. **Planning** is best defined as mapping out in advance what needs to be done to make the new institution a success. On the other hand, **organising** means creating an arrangement of positions through which an enterprise can carry out its work. This would be different from **motivating**, which entails calculated rewarding of staff, thereby encouraging them to work with commitment. Finally, **controlling** refers to defining the extent to which certain responsibilities should be carried out. These four should be expedited by taking into account three considerations fundamental to setting up, and these are: the strategic plan, the mission statement, and the vision spelt out for the new institution. The strategic plan is normally formulated before the institution begins to operate, or during the early stages of operation. It should not be left until too late otherwise implementation will be haphazard. Rumble (1997) recognizes the importance of strategic planning as the key to successful establishment of an institution in a new environment.

Quality Issues

I wish to use a blanket term for any action or practice that is aimed at ensuring that whatever the new institution strives to achieve is up to standard. That term is *quality*, defined by Robinson (1993:77) as "a product of planning, monitoring, control and coordination". It is, thus, not merely a set of procedures to be followed, but rather also an attitude or ethos to be cultivated in the key stakeholders of the new institution. I propose to borrow ideas used in setting up Kyambogo University (KYU) in Uganda, which those responsible for setting up institutions in Southern Africa would do well to take into account. KYU was set up in 1957 to provide training for teachers through distance education. The book by Graham & Terney (2003) confirms the significance of these aspects in new ODL circumstances:

a. The products

Those tasked with setting up the ODL institutions, should take into account the products, that is:

- ***The courses and materials.*** This includes training of writers and designers, a qualitative editing process, and a defined house style.
- ***The number of graduates or successful completers.*** The planners should put in place a continuous monitoring system to be used by those coordinating the programme, in collaboration with the academic registry of the institution.

- **Examination pass rates and throughput.** The quality of assessment tools and the rate of completion by enrolled students should be monitored through clearly laid down procedures.

b. The processes

The success of a newly established institution depends on the efficacy of processes and laid down procedures. Some of the processes are:

- Learning and teaching processes such as tutoring, assessment, learner feedback, monitoring field workers, etc.
- Application, registration and examination procedures.
- Record keeping both at headquarters and at the study centres.
- Advisement and counselling of students, that is, keeping track of them.
- Coordinating groups of part-time writers and tutors.

c. Production and delivery systems

Setting up an institution involves planners in putting in place the clearest policies about production and delivery systems. These should not be left to chance.

- **Course production.** The institution must follow tendering and procurement procedures to get value for money.
- **Print production.** The planners should ensure printed materials are of quality.
- **Scheduling.** This involves following up (chasing) printers and suppliers to ensure timely delivery.
- **Warehousing and stock control.** What is needed should be printed and distributed in time.
- **Getting materials to students.** Planners should follow shared procedures in the distribution of materials.

d. A general philosophy of governance

When setting up an institution, the planners or the prospective head must deliberately plan the institutional ethos, that is, what philosophy will guide governance. Such a philosophy should be simple, easily understood by all, and properly communicated. Specific areas should be specified and included in the ethos. Among these are the following.

- **Policies.** The new institution should have policies in place. Policy development should be a coordinated activity, to come up with policies and procedures in dealing with commonly recurring issues. Policies facilitate the flow of information between departments as well as between senior management and departments. Policies should be readily accessible at all times to both already serving and newly recruited employees.
- **Attitudes of staff.** A progressive ethos as espoused by the leader of an institution should develop a sense of belonging for all employees, irrespective of status. Regular

training and the holding of workshops to address identified needs goes a long way towards improving attitudes.

- **Management and training of staff.** A wide range of training activity should be undertaken.
- **Images and messages presented to the public.** These include publicity leaflets, brochures and press reports. The contents of these should be reviewed regularly to ensure the correct reflection of institutional ethos at all times.

The foregoing quality issues, some of them attributable to Robinson (1993) are strongly recommended for adoption by the practitioner who may happen to be charged with setting up a new institution.

?? Graham & Terney (2003) propose four quality issues to do with setting up ODL institutions. Why do you think a general philosophy of governance is an important quality issue for your newly established organisation?

Among some of the key components of governance are: policies, training of staff, the image of the organisation, and the attitude of professional staff. An institution that does not have in place a systematically spelt out governance philosophy on the aspects will operate without guidance. It is, therefore, more than likely that its key operations of management, course development, communication, and learner support will be haphazard, a situation that would not place distance education provision in a favourable light.

Setting up an institution as a composite project

There are altogether new ways of thinking about the construction of ODL ideas, plans, and the general approach to dealing with issues. One such pattern of thinking or paradigm, which has not been given much attention in the past is thinking 'projectwise'. I wish to accentuate that the project management approach is at the epicentre of setting up a new institution. Establishing a college or university is a project that contains many projects in it – a composite project. The person in-charge or the project manager should be aware that his/her role is to:

- plan with the team members;
- help the team members get the work completed;
- get scarce resources that are required;
- buffer members from disruptive outside forces;
- facilitate communication to ensure information reaches stakeholders; and
- provide leadership.

Leadership can be simply defined as the art of getting others to want to do something because they feel they have something to do rather than feeling that they have to do something (cf. Tichapondwa and Tichapondwa, 2009:27). Leading the establishment of an institution involves management of various facets such as stakeholders, risk, cost, change, and communication management.

a. Stakeholder management

Duncan Haughey (2009) has defined a stakeholder as anyone who has an interest in your project or will be affected by its deliverables or output. It is important to understand the values and issues that stakeholders have in order to address them and keep everyone on board. Who are your stakeholders in ODL? Modesto and Tau (2009:29) identify the following as key stakeholders for a given institution:

- The state
- The board of governors/ the council
- Course developers
- Commerce and industry
- The public
- The learners

Each stakeholder is interested in the system for different reasons.

b. Risk management

What exactly is a risk in everyday life? When somebody says walking alone at night in the squatter camps is a risk, what does that person mean? Probably he/she means that there is a possibility of being mugged or robbed. In other words the word ‘risk’ refers to the possibility that something unpleasant might happen by taking a certain action. If we accommodate this rather simple definition, how does it fit into the management of a DE project such as setting up a new college? For example, what risk does the manager have by investing money to hire part-time writers to develop study materials? The risk is that writers who sign in at the outset might fail to honour their commitment in the middle of the project. There is the risk of losing money and time having to advertise for new writers; pay for the new advertisement; lose out on time, necessitating shifting target dates. The admonition from Paul Bower (2009:2) is worth your attention as a practitioner dealing with a new institution. You should:

- identify major concerns for each milestone;
- identify risks and risk owners;
- evaluate risks as to the likelihood and consequences;
- assess the options for accommodating the risks;
- prioritise the risk management efforts;
- develop risk management plans; and
- track the risk management efforts and manage accordingly.

In exercising that prerogative, there are a number of risk management options you could adopt, and these include avoidance, control, assumption, and transfer of risk to somebody else.

c. Cost management

What happens if the project is underfunded is that your institution will be doomed. What ideas are available to guide the project manager on how to estimate cost? Joseph Phillips (2009) suggests estimate types that project managers should rely on. Two of these are of particular interest to setting up a new institution.

The Budget Estimate

This is also known as the top-down estimate, and is formulated fairly early in the project planning stage. The budget estimate is based on analogous estimating, taking

budget lessons learned from a similar project (managed previously or managed elsewhere), and applying them to the current project. You start at the top and work your way into the project details. The budget estimate is considered to be quick but not very accurate. The range of variance is from: -10% to + 25%.

The Definitive Estimate

This is also known as the bottom-up estimate, and considered to be more accurate than the Budget Estimate type. The Definitive Estimate requires a work breakdown structure (WBS), a deliverables-oriented decomposition of the project scope, that is, all items that the institution is expected to expend on. The WBS is needed in order to create a more definitive estimate that accounts for each deliverable. The main problem with this type of estimate is that it takes lots of time to create, but it is the most accurate estimate that can be provided for the project. The range of variance is relatively low: -5% to + 10%.

d. Change management

Tichapondwa and Tichapondwa (2009:95) illustrate change management anecdotally as explained presently.

When the Ministry of Transport of your country carries out a project to build a bridge, the objective is to bring change in real time. It is tangible change that involves construction of a structure where either there was no bridge at all and cars could not cross during the rainy season, or there was a structure that could not carry heavy vehicles. Similarly, in distance education, setting up a new ODL college or university is aimed at bringing change. Change affects people and ushers in new ways of doing things. Naturally, therefore, people perceive change differently. Some welcome it, while others resist it. It is, therefore, important for the project manager to note that change management is an area for which the need for knowledge cannot be overemphasised. The stakeholders of the new institution and the project team will be striving to come to terms with change implications.

1. Do you concur that managing a project involves management of change?
 Yes No
2. Do you think that some people could resist establishment of a new institution?
 Yes No
3. Have you experienced people resisting change in a project you took part in?
 Yes No
4. As manager do you think management of change should be planned for?
 Yes No

I think for all the four questions you came up with a 'Yes' answer. If you came up with a 'No' answer for some, it is OK, but see if the ideas discussed below will make you think differently.

Jonathan Palmer (2009) has observed that resistance to change in any project is inevitable and may be passive or active, overt or covert, individual or organised, aggressive or timid, and on occasion totally justified. Note *Justified!* In my opinion resistance is justified for a number of reasons such as:

- lack of information about the purpose of the project;

- people thinking that the intended change is not necessary;
- members seeing the project as interfering with traditional institutions;
- some team members might think there is nothing of interest to them in the new institution;
- there might be personality clashes among team members, or between the project manager and some members; and
- some members may feel that they do not have enough expertise to take part in bringing about change, though they may not acknowledge this openly.

e. Managing communication

One of the issues that planners should consciously manage is 'communication'. As a planner you may have a meticulous plan on paper, and schedule the project supported with what you believe to be a good team, but unless you interact with members with some degree of efficiency, you will end up with a new institution that is wanting in terms of ethos, hence a failure from the outset. Typically, there is discourse we associate with project management to the extent that the manager and the team can be legitimately regarded as a speech community. They should speak the same language. The project speech community has a purpose and uses language to interact. Interaction can be defined in simple terms as acting upon one another, through language in order to exchange meaning and share understanding of the various stages of the project. Communication in the context of working to establish a new ODL entity is, therefore, a conscious activity distinguishable from ordinary day-to-day social and personal conversation.

As one of the members of the planning team, there are five points to bear in mind regarding the purposes of communication. These are best expressed in the form of questions that you can ask yourself.

- Why do stakeholders have to communicate?
- What is to be communicated?
- Who communicates with who?
- Where should communication take place?
- When is it best to communicate?
- How best should communication take place?

These are some of the few aspects to be managed towards successful establishment of the new institution. As manager of the composite project, the planner must keep on keeping on, then think and keep on thinking. At the same time the manager will, at the back of the mind, know very well that there will always be challenges, some perceived as being insurmountable, and others surmountable.

?? Why do you think risk management is important in the establishing of a new ODL institution?

The word 'risk' refers to the possibility that something unpleasant might happen by taking a certain action. In a new institution, there are numerous decisions to be taken, for example, programmes that will sell, identification of staff with relevant qualifications, or acquiring relevant technology. Proper risk management is necessary

as a safeguard against spending money on issues that do not enhance the project. For example, it is possible to spend money on computers for different ODL regional centres when there is neither electricity nor trained staff to handle the technology. The risk is that such gadgets will remain idle, gathering dust despite having spent so much money.

Challenges in setting up a new ODL institution

There are certain commonalities among SADC countries regarding challenges in starting up new institutions. In their book-long discussion on introducing distance education in new environments, Modesto and Tau (2009) present some of the challenges. The following are some of them:

- There are few countries, if any, that have a national ODL policy in place. This is an instrument that is facilitative of harmonisation of intentions and activities, without which an aspiring new institution will practise with considerable difficulties.
- In general, there tends to be a misunderstanding of what ODL can achieve. This is true even at the highest political level, and the direct result is that where there is no political will, the situation on the ground remains arrested in some kind of paralysis.
- ODL development tends to be hampered by inadequate funding, largely because there are limited funds allocated for education. In developing countries, the established conventional institutions usually get priority funding.
- Where institutions get established, the demand for programmes and services often outstrips the capacity of the institution, to the extent that human and physical resources get overstretched. The result is poor delivery and mediocre products. This is common where leadership is unable to say 'no' to requests from all angles of the nation just like the eager puppy that follows anyone who pays attention to it.
- Competition from the private sector can be a challenge when setting up an institution. Some private sector providers can offer programmes within a shorter time than would be expected. Clients, therefore, rush for that thus disadvantaging the new entity.
- Lack of expertise can frustrate the best of intentions to establish a dynamic institution in the midst of competition. Typically, ODL has its unique characteristics as a discipline when compared with conventional education. The challenge is getting readily trained personnel to take up responsibilities in learner support, management, research, and programmes development.
- Lack of business orientation has often been noted to be quite a considerable challenge. This refers to the absence of managerial skills, pertinent to ODL, among planners and implementers of projects. Probably prior experience in traditional/conventional education is not, on its own, a guarantee that a professional will be able to function to meet expectations. This is probably because we function best the way we have always functioned, unless specific interventions are consciously taken.

- By its very nature, ODL becomes feasible when there is ICT support available to traverse transactional distance. Technologies can be pricy in circumstances where budgets are shrinking. Additionally, there is a challenge of expertise where ICTs are donated by non-governmental organisations or other international organisations. This can be a challenge in setting up a new institution.
- Unless systems and processes for quality assurance are pre-determined on the governance of the new institution, its management can be both chaotic and haphazard when such systems are not in place. Management of academic institutions through a commonsensical approach has never been underscored with success anywhere in living memory.

These and many other challenges should be borne in mind. What Levine and Sun. (2002:1) say about the ODL scenario in the USA resonates the challenges raised above. Among some of the barriers that these authors observe are:

- Distance education is not accepted as an appropriate teaching method.
- There is competition for limited financial resources.
- There are deficiencies in governance.
- There is no consensus on accreditation.

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CHAPTER 3
Staff Development in Open and Distance Learning

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Some Questions

1. What is staff development?
2. What is the significance of staff development in ODL?
3. What is the nature of ODL staff development?
4. What are the competencies of ODL practitioners?
5. What are the ODL practitioner staff development models?
6. What are some of the staff development quality issues in ODL staff development?
7. How are ODL practitioner staff development programmes developed?
8. How are ODL practitioner staff development programmes managed?
9. How are ODL practitioner staff development programmes evaluated?

Introduction

Open and distance learning (ODL) represents a dynamic and flexible pathway of academic endeavor that serves different needs within a global education and economic environment. It has gained momentum around the world as a new, flexible, and dynamic way of acquisition of academic knowledge and professional experience in a complex albeit changing and challenging global environment (Feldmann and Schlageter, 2001). The overall philosophy of open and distance learning is to provide additional and student-oriented opportunities that will enable individuals, who might have missed earlier life opportunities for academic achievement, to select a personal pace of learning irrespective of place and time (Commonwealth of Learning, 2000; Monk and Hitchen, 2005). Southern Africa Development Community (SADC) is a group of 13 countries and almost all the countries have one or more ODL institutions. However, as the demand for ODL courses offered by SADC ODL institutions increases so does the need for skilled and knowledgeable ODL practitioners as opposed to traditional lecturers. With expansion and wider use of ODL delivery mechanisms, a continuous need for staff development of the practitioners is critical.

The nature of staff development in ODL

Staff development plays a crucial role in shaping the skills of ODL practitioners, which ultimately benefits the organization in terms of available skilled human resource for the promotion of knowledge in order to provide effective support services to learners. This is even more critical in ODL institutions where most of the practitioners involved in design, development and delivery of programmes are mainly drawn from the conventional education system. Chick (1990:17) says, “Most policy makers and opinion leaders have very vague ideas about what distance education actually entails and almost have no understanding of its possibilities and limitations.” Thus, distance education institutions world over, and in particular those in the SADC region, require practitioners who understand the ODL philosophy and practices.

However, a search of literature on programmes offered by African universities in the SADC region indicates that very few African universities offer diplomas or degrees specifically on the philosophy, epistemology or pedagogy of ODL. From these observations, both administrative and academic practitioners need to be continuously staff developed if we want to have quality ODL in SADC countries. Therefore, the problem in most ODL institutions is that most practitioners are recruited from conventional universities that do not capacitate them in the ODL philosophy and practices. Therefore, staff development in ODL has come to be viewed as indispensable if the goals of the ODL organization are to be realized and the training needs of practitioners are to be met.

?? What then is staff development in ODL?

My definition of staff development in ODL is :

Compare your definition with the following three definitions.

Towards a definition of staff development in ODL

1. Harris (1989) viewed the term *staff development* as embracing much more than in-service education. He defines it as any learning activity undertaken by individuals, teams or organizations to improve their skills, knowledge and abilities, particularly as they relate to the workplace and from which added value can be ascertained.
2. Staff development refers to the processes, programmes and activities through which every organization develops, enhances and improves the skills, competencies and overall performance of its employees and workers. The Human Resources (HR) department of an organization is generally vested with the task and responsibilities of staff development (National Staff Development Council U.K., 2010).
3. The University of London staff development policy (2002) defines staff development as a process to ensure an organization's workforce is adequately equipped with the knowledge, skills and competencies to perform well in their current work-role and for the future to assist the organization in achieving its objectives.

The three definitions combine the organisation's need for competent workforce and the individual's need for having knowledge, and skills to improve personal and the organization's performance. In this text staff development is defined as the process of providing opportunities for practitioners to improve their knowledge, skills and performance in line with the goals and values of the ODL institution and in relation to the interest and needs of the practitioners. Therefore, in this context staff development refers to the processes, programmes and activities, through which every organisation develops, enhances and improves the knowledge, skills, attitudes and overall performance of practitioners.

However, we observe that most ODL practitioners in most Southern Africa ODL institutions come from conventional universities and high schools and have little if any, appropriate competencies for ODL. This indicates that within SADC, ODL institutions' staff development must therefore be proactive rather than reactive. Staff development in ODL institutions, needs to keep these institutions' systems alive and vital by continuously capacitating the newly recruited and the old practitioners in the philosophy, epistemology and pedagogy of ODL. Practitioners from many organizations take part in a variety of staff development programmes intended to equip them with new knowledge and skills or alter views, attitudes, values, beliefs and feelings and thereby improve performance at the workplace. Therefore, staff development by definition is a dynamic and evolving process, and it is important to recognise that development is not only achieved through formal provision such as courses but also by other methods such as mentoring, collaboration, private study, experience and reflection.

It has been observed that the quality of education is attached to the staff development of practitioners. Thus, aims of staff development in ODL would be undertaken to achieve the following:

- a) improving teaching and learning process;
- b) improving research activities;
- c) enhancing and developing new knowledge; and

d) Understanding innovative techniques of staff development.

However, the staff development process in ODL has many facets as evidenced by numerous terms in the literature that name the process.

FACETS OF STAFF DEVELOPMENT PROCESSES IN ODL

- ?? a. Write down the staff development names in the context of your institution.
b. Compare them with the following staff development names found in literature.

Such terms include but are not limited to academic exchange, capacity building, mentoring, professional development, in-service education, continuing education, on-the-job training and human resources development.

A brief review of the meaning of each of the concept will go a long way in helping you understand staff development in ODL.

Academic exchange

Academics visit other institutions preferably in other countries. This could be done in groups of at least four academics at one institution coming from different countries and different universities. The idea is for the practitioners to work on a project and in doing so exchange ideas within the group. The members will also have an opportunity to find out what is happening in their field in the other side of the world. The duration for the visit ranges from one to twelve months.

Capacity building

According to UNESCO (2002:90), capacity building in the context of open and distance learning should promote accessible quality distance education tools reflecting regional, social and economic needs. Thus, UNESCO within the framework of its policies, priorities and programmes contributes to the development of staff in the areas of management, administration, student support systems, policy development and course materials production. It has been discovered that the methods of teaching and learning in open and distance learning mode require that practitioners be thoroughly familiar with the instructional design and delivery process (Ansari, 2002). Therefore, ODL practitioners need staff development/capacity building in instructional message design, strategies for delivery instruction, diverse methods of presentation, interactions and assessing the level of learning by the students. With the explosion of technology in open and distance learning it is important to capacitate ODL practitioners in the e-learning concept.

Human Resources Development

This is a very broad concept, which includes such functions as employment, recruitment, compensation and benefits, employee communications, job engineering, organizational analysis and development. Human resources development combines elements of industrial psychology, personnel management, training and industrial relations. It attempts to develop programmes, policies and activities to promote the satisfaction of both individual and organizational needs, goals and objectives.

Mentoring

Mentoring is defined as a face-to-face, long term relationship between a supervisory adult and a novice student that fosters the mentee's professional, academic, or personal development (Donaldson, Ensher and Grant-Vallone, 2000).

On-the-Job training

This is a form of staff developing practitioners to acquire new skills in a job that they are already doing or learn an entirely new job.

Professional development

This is broader in meaning than staff development. It implies an improved capacity for control over one's working conditions, and an enhanced professional status and career advancement. Professional development would probably more often refer to activities serving individual needs as opposed to those of the institution.

?? Comment on the similarities and differences of the above concepts to do with staff development.

In order to formulate a good response, read each concept closely, then identify similarities and development. For example on-the-job training is similar to professional development in the sense that it is undertaken to develop a practitioner's competencies. The difference could be that professional development, a more generic term, is not necessarily done on the job. A practitioner could be sent to some external institution to do studies.

ODL staff development needs, their identification and analysis

Definition of Needs

Hansen (1991) defines needs as subjective perceptions of something useful for a purpose that a person or community is able to specify. Needs can, therefore, be perceived or felt by an individual or community in its quest to improve the current situation. In this context we view needs as a gap between the current and the desired situation. In other words needs are viewed as a discrepancy that can be remedied.

Training needs Analysis

According to Hayton (1991) training needs analysis is the identification of the differences between the skills or competencies held by the individual or group and the skills or competencies required for the job. Colin and Latchem (1998) concur with Hayton (1991) when they assert that needs analysis refers to the systematic processes of identifying the standards of skills, knowledge and attitudes required in a job and auditing existing levels to establish where and in what respects these need empowerment. Therefore, before development of training programmes for the ODL practitioners, there is need for the institution to undertake the training needs analysis for the practitioners. Undertaking the survey of training needs assessment would help to determine whether or not staff development would be a solution to the discrepancy.

The following questions would need to be answered before embarking on developing staff development programmes:

- Does a performance discrepancy exist?
- Can we correct the discrepancy through staff development?
- Is staff development the most cost-effective solution that can be applied?

Identifying staff development needs is critical and is the foundation for the staff development programmes. Therefore, training needs analysis will serve as a foundation for the development of staff development programmes. When the data is analyzed for ease of training, it is critical to divide them into the training needs for academics and those for administrative professionals. There is, however, need to gather information that will be used to identify the training needs. It is important to note that a gap in knowledge or performance may not be bridged by providing training. Other factors may be responsible, for example the organisational structure, systems, culture or reward systems may be applied to fill the gap. The other critical area besides identifying the training needs is for the staff development leader to understand the sources for the staff development needs.

?? Write the sources of staff development needs from within and outside your institution. Well done! Now compare your answers with the following sources.

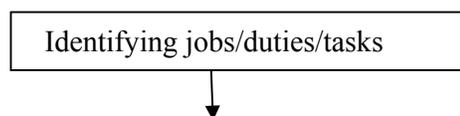
Sources of Staff Development needs

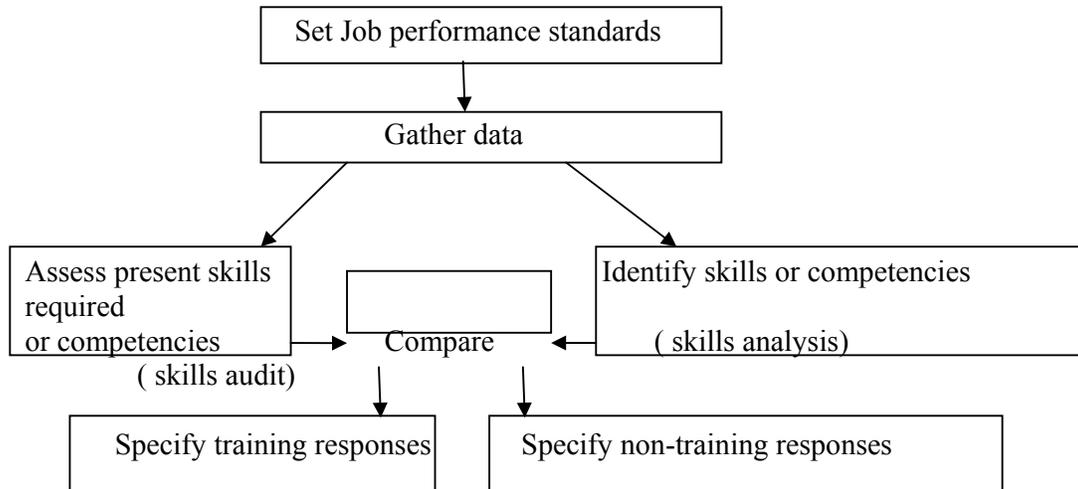
Earlier on we discussed that most ODL practitioners are recruited from traditional or conventional universities and as such lack ODL competencies. Therefore, ODL practitioner development needs to emanate from different sources. Some of the sources from which needs are derived are one's age, personal and professional education, teaching experience, research experience, technology, personality and personal experience. Some of the practitioner development needs that could flow from the above sources include but are not limited to:

- a. The desire to acquire ODL epistemology, pedagogy and philosophy.
- b. The desire to write distance education materials.
- c. The need for practitioner to develop capacity to effectively use technology as a delivery mode.
- d. The desire for the practitioner to effectively manage a distance education institution.
- e. The need to effectively manage e-learning.
- f. The need to acquire skills for distance education learner support.
- g. The need to induct new practitioners.
- h. The need to equip newly promoted practitioners with knowledge and skills for the new responsibilities.
- i. The need to learn how to operate new equipment and machinery.

Remember that the above training needs are generic. Each institution will need to identify specific training needs for their practitioners using the steps illustrated in Figure 1.

Figure 1 Process for identifying training needs





The process starts by identifying jobs, duties or tasks that are performed by each practitioner. Bear in mind that in each institution tasks are performed at different levels of the institution. Thus the training needs for senior management would be different from the training needs for the faculty administrator. This is critical because it is not every practitioner in an ODL institution who will be tasked to write learning materials, carry out research, implement learner support systems or distribute the learning materials. In open and distance learning environment practitioners tend to be more specialized in their tasks compared to traditional education system.

After identifying the tasks to be performed, the next step is to set job performance standards. Performance standards provide practitioners with specific performance expectations for each duty or task. Data will be gathered based on these standards. The data will be used to conduct skills audit and skills analysis and compare the results. The results will determine the basis for staff development planning to fill the identified gaps in competencies. However it must be remembered that not all gaps will be filled with training programmes. Some will be filled by non-training responses. For example, Table 1 below demonstrates the training needs of UNISA practitioners after needs analysis was undertaken in the institution.

According to Braimoh (2010:6) training topics that emerged from the training needs analysis they undertook at UNISA are divided into two sections. One section for the academics, and one section for administrative or professional services are illustrated in the following table.

Training topics from training needs analysis

Academics	Administrative/Professional Services
Course design and development	Understanding ODL systems and processes
Orientation on systems and processes in ODL	Systems and technology training for administration staff.
Teaching strategies and models	Customer service training
Skills in developing or enhancing student centred learning environment.	Communication and interpersonal skills
Understanding of different learner support services.	Study material tracking systems
	Management information reports

ODL assessment strategies ODL facilitation processes Writing and editing skills Basic technology and usage of technology in ODL Multimedia learning Collaborative and team work skills Data analysis.	Web 2 training Planning in ODL Online development learning Blended learning.
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Adopted from Braimoh (2010:6)

?? How do your training needs compare with those at UNISA? Discuss with a friend.

The response will be contextual, that is, it will be based on the institution you serve. Therefore, describe what really happens, compared to what happens at UNISA. It is possible that you will have some few things to benefit from the UNISA model. See if you can accommodate these in order to improve your situation.

On another note at a round table (Commonwealth of Learning , 1990) participants identified the following as priority training needs:

- Basic orientation to distance education.
- Planning, management and administration.
- Instructional design, and course development, including course adaptation.
- Use of technology, including computers.
- Research and evaluation.
- Student support services.

Thus if we want to have skilled ODL practitioners, no staff development should be undertaken without taking into account what the practitioners already know and what specific challenges they face in undertaking their duties. However, understanding the needs of practitioners will be enhanced if the people charged with the responsibility for staff development know the generic ODL practitioners' competencies.

Generic competencies for ODL practitioners

?? Write down your understanding of *competence*. Compare it with the following definition.

According to Spector and la Teja (2000:1) competence refers to a state of being well qualified to perform an activity, task or job function. When a person is competent to do something, he or she has achieved a state of capability that is recognizable and verifiable to a particular community of practitioners.

A competency then refers to the way that a state of knowledge and skills can be demonstrated to the relevant community. The generic competencies for ODL practitioners include:

- Courseware design and development
- Facilitation of learning via ODL (assessment)

- Collaboration/teamwork skills
 - Planning skills
 - Writing skills
 - Project management skills
 - Knowledge of distance education field
 - Basic technology
 - Skills in development of student –focused learning support
 - Technology – based instruction
 - ODL Research Skills
 - ODL Management and administration
 - Change agent skills
- (cf. Thuch and Murphy, 1995).

It has been observed that the advent of the use of technology in ODL has necessitated ODL practitioners to be competent in what is now called e-learning.

?? a. How computer literate are you?

b. What are the tasks that you are able to operate?

Good for you if you are highly computer literate. Computer literacy, the ability to use computers to perform a variety of tasks, becomes fundamental to being involved in open and distance learning programmes. Write down areas for e-learning capacity building for practitioners in your ODL institution.

Compare your areas of training needs with the following:

- Basics of e-learning
- Instructional design
- Psychological aspects of learning
- Online –communication in e-learning
- Formal and informal assessments
- Multi-media production
- Usability
- Project management for e-learning
- Cooperative and collaborative e-learning
- Virtual classrooms
- Virtual region
- Virtual university

?? Staff development in ODL has come to be viewed as indispensable if the goals of the ODL institutions are to be realized. Write down your view with regard to this statement.

Now that we know how to undertake the needs analysis and understand the generic competencies for the ODL practitioners, we can now talk of how to plan staff development programmes. Using the above concepts we can demonstrate the staff development planning process as in figure 2.

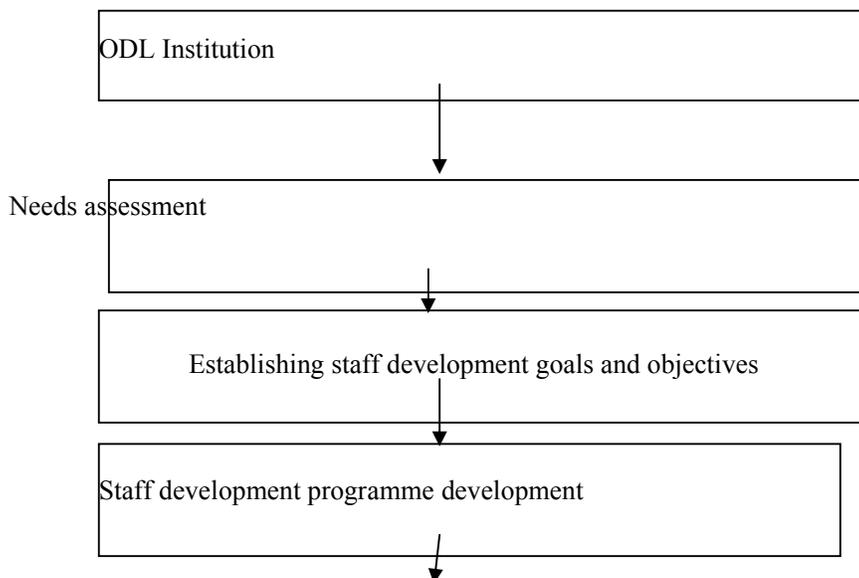
ODL staff development programmes

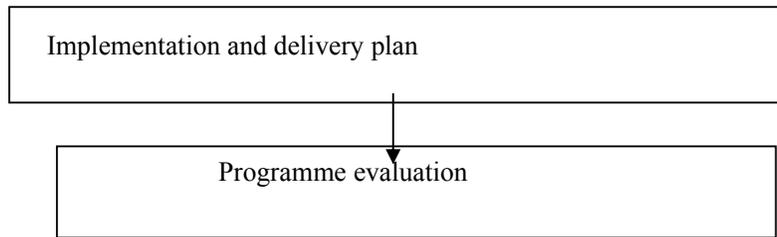
In the context of ODL staff development, a programme is defined as a sequence of educational experiences purposefully selected to address a locally identified need. Thus, programme development is taken as a deliberate process through which staff developers are involved in designing, implementing and evaluating programmes that address identified training needs.

The process of programme planning serves several useful functions in ODL staff development. A few of these functions are identified below:

- *Direction* – programme planning helps to identify what is important to practitioners in different faculties and units with regard to knowledge, skills and attitudes of ODL. It helps staff developers to set staff development programmes priorities.
- *Intent* – a plan of work helps communicate to the public what the institution intends to focus on over a specified period of time.
- *Commitment* – the best way to ensure follow through on intentions is to put those intentions in writing. A plan of work makes a commitment to act in accordance with intentions.
- *Evaluation* – the planning process encourages staff developers to define what success will look like and how it will be measured.
- *Accountability* – a comprehensive plan of work lets staff developers know how the institution plans to allocate valuable resources and the results it intends to be accountable for producing.

Figure 2 Staff development planning process





Within a given ODL institution, there is a human resources department that has a mandate for staff developing of the practitioners. The human development department should understand the competencies possessed by practitioners. They undertake the training needs for the institution's practitioners. They also use the results and information from the institution's strategic plan to draw the staff development goals and objectives. These could be divided into long and short-term staff development goals and objectives.

Good that we have the staff development goals and objectives. Just remember that the specific goals of the training process must be derived from the organization's objectives and be determined by the management in collaboration with staff developers' agencies such as human resources, faculty and research and development units. Before the staff development leaders develop the training programmes they need to take into consideration that staff development is intended to alter behaviour on three different levels:

Cognitive level: providing the basic knowledge necessary for performing the tasks involved in the job and the results expected.

Skills level: developing and reinforcing various skills (e.g. communications service, research, management or even motor skills, in the use of technology) associated with on-the-job tasks and duties.

Emotional level: shaping attitudes, values, emotions and motivations since the purpose of staff development is to improve performance.

The next step is to develop the training programmes. It is critical for the staff development leaders to understand that training is done for different practitioners according to the identified needs and at different levels. They also need to have both financial and human resources in order to carry out effective staff development programmes. In other words, the planners or leaders before designing the programme sessions need to be aware of:

- the designated clientele for example the tutors/lecturers, managers, the deans or directors;
- one or more objectives that the participants should achieve per session and;
- a time frame or duration of the sessions.

The next step is to plan the implementation and delivery plan. The planners or leaders for the staff development will need to incorporate the content and the delivery mode. The designation of responsibility should be clearly spelt out, checklist of the materials

and equipment to be used should be drawn up and the facilitators should be identified and notified well in advance. Rewards and incentives, both intrinsic and extrinsic should be spelt out to the programme participants. It is critical to plan the evaluation and budget for the programme before implementing it.

One of the critical activities in planning the staff development programmes is to plan for how to evaluate them. Evaluation in ODL staff development is undertaken to ascertain:

- effectiveness of the training methods and approach;
- the extent to which the objectives of the trainers and the participants were met;
- the extent to which the training was reflected in improved practice;
- the evidence of impact at the organisation's level;
- the extent to which the training was provided at an acceptable cost

(Lookwood and Latchem ,2000)

Various types of evaluation methods may include formative and summative written surveys to determine participant satisfaction with training sessions, and written checklists to be completed by trainers or online surveys to determine participants' satisfaction with the courses. Summative evaluation is about assessing the effectiveness of a given programme, while formative is about finding out areas of improvement within the programme (Patton, 2003). In essence, programme evaluation focuses on the staff development programmes processes and outcomes. The purpose is to improve the implementation strategies so as to accomplish the intended goals. It has been observed that staff development programmes for open and distance learning needs to be periodically evaluated to determine whether or not to continue the existing training or to modify it. Evaluations are expected to provide answers to specific questions such as whether or not the specific objectives of the staff development have been met, and whether or not the training was carried out as intended. Data should be collected on an ongoing basis to assess participant reactions to training, and the impact on students. Results from the collected data should be distributed to trainers and decision makers.

The other critical area in programme planning is to plan for the budget for the activities that are implemented. It is important to cost all the sessions planned and have an estimated cost that will be weighed against the staff development budget. It is no use to plan for activities that cannot be fully paid for. Therefore, once the costs have been estimated and the sources for funding are scanned, decisions will be made to implement the training programmes, to scale down or to abandon them altogether. However, it has been observed that goals and objectives as well as the purpose for the programme determine the type of delivery mode and activity.

?? Describe the types of training programmes offered in your institution.

Compare your practices with the ones given below.

Types of faculty and staff training programmes

Some of the staff development practices in ODL include but are not limited to:

- Workshops to encourage professional growth and to develop new teaching or working methods

- Lecture programmes
- Informal and recreational offerings
- Sabbatical / retraining
- Enhancement of technical skills
- Conferences
- E-learning

The significance of staff development in ODL

?? What do you think is the significance of staff development? Write down your answer. Compare your answer with the purpose of staff development given below.

The purpose of staff development is to improve job performance, enhance the quality of the work environment and foster personal growth and development. Through involvement in staff development activities, faculty and staff acquire knowledge about educational issues, develop and utilize new or improved skills or work methods, clarify work-related attitudes or values, derive greater satisfaction from working with students and develop more stimulation and supportive relationships with colleagues. Dearnley and Galecliffe (1999) assert that staff development has the potential to increase the effectiveness of the individual on a personal basis and as a team member. Furthermore it may also promote career development, increase job satisfaction and enable practitioners to management and deliver new initiatives in a time of change.

The current status of ODL staff development in SADC

The quality of service provided to open and distance learners by ODL institutions depends on:

- the expertise of the practitioners of these institutions,
- constant change in the needs of open and distance learners,
- changing technologies, and
- growth in practitioner knowledge.

It is observed that these changes demand that ODL workers must expand their understanding and update their skills on an ongoing basis. Because adequate learner support depends on practitioners who are well prepared and continuously learning, the quality of staff development in ODL institutions is of vital concern.

Therefore, the responsibility for continuing staff development is supposed to be shared by individual practitioners, their employing institutions and professional associations. The need for improved learner support has become universally accepted and that it depends on efficient and effective staff development is not less apparent (Latchem and Lookwood, 1998). Staying current in ODL practice has never been easy and the rate of technological change and levels of complexity in ODL continues to increase. Thus staff development is required of practitioners if ODL institutions are to prosper. Staff development activities give practitioners fresh perspectives and new ideas. It provides them a time for rejuvenation and reflection and gives them new leading edge skills. Staff development in ODL supports teaching, learning and research. These activities enhance the learner support systems. We will look at some

staff development models from a few countries inside and outside the SADC countries.

STAFF DEVELOPMENT MODELS

University of South Africa (UNISA) staff development

The UNISA Master's and Doctoral Support Programme (MDSP) is aimed at providing targeted support to staff members from the designated groups – blacks, women and the disabled – who are eligible or are already enrolled for Master's and/or Doctoral degrees. Staff members who have recently obtained Doctoral degrees (in the past two years) also qualify for postdoctoral research support in this programme. The nature and extent of the support will not duplicate but will seek to enhance forms of support already available to staff within the existing university research support systems and programmes. As such it is designed to cohere and articulate with, rather than to compete with other schemes and initiatives designed to develop the potential and sharpen the skills of UNISA researchers. However, the staff development is not specific to ODL practice but is just degrees similar to the degrees obtained from conventional universities. The programmes that were specific to ODL philosophy and pedagogy were phased out due to low numbers of students from the SADC region (http://www.unisa.ac.za/contents/research/docs/M&DRResearchProgStaffFinaldraft_3Oct07.pdf). The aim of this type of staff development is to increase the number of post-graduates in the university staff pool, and not merely to skill the staff with ODL competencies. However, in 2008 UNISA established the Institute of Open and Distance Learning (IODL) that is currently capacitating the UNISA practitioners in research and ODL competencies.

Open University of Tanzania staff development

The Open University of Tanzania has a performance based incentive policy and operational procedures that include provision of professional staff opportunities for management training and professional development and growth (Mbwette, 2008). This type of staff development does not specifically develop the practitioner into an ODL specialist but, as at UNISA, increases the pool of post-graduates in the university. Thus, the information on staff development from these two renowned ODL institutions indicates that there are no specific programmes for making staff experts in ODL practices.

ZOU's experiences of staff development

As mentioned earlier on, there are few institutions of distance learning in Southern Africa that offer degree programmes specializing in ODL philosophy and pedagogy. Reviewing the literature on staff development raises the question whether staff development in ODL is taken seriously in SADC countries. For example an examination of ZOU staff members' qualifications in 2006 indicated that only three of the 76 academic members had a post graduate certificate in distance education from UNISA and one member had a Master's in distance education from Indira Gandhi Open University. The rest had their qualifications from conventional universities (ZOU Human resources report, 2006).

Staff development at the Botswana College of Distance and Open Learning

Staff development in ODL is a systematic development of knowledge, skills and attitudes required by employers to perform adequately on a given task or job. Staff development is needed for practitioners to enable them work towards taking the organization to its expected destination.

?? List any staff development models that you find in your country or other countries in the global village

Challenges

There are many challenges that are commonly faced by open and distance learning organisations and institutions in the region, and some of these are:

- inadequate funding for ODL by central governments;
- the lack of ODL national policies. Having a national policy would facilitate a shared understanding of the need for staff development by stakeholders. In its absence, there tends to be limited appreciation of such a need;
- it is difficult to find replacements when staff go away to study for longer periods; and
- there are few institutions of distance learning in Southern Africa that offer programmes specializing in ODL philosophy and pedagogy.

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CHAPTER 4

Managing Projects in Open and Distance Learning Organisations

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Some Questions

1. What are the origins of project management?
2. In what ways is project management linked with open and distance learning?
3. What are some of the key concepts of project management that the ODL practitioner should be familiar with?
4. What is the significance of interactivity in the management of ODL projects?
5. How is teamwork developed in the management of an ODL Project?
6. What should be taken into account when planning and organizing a DE project?
7. What categories of participants does one expect to find in a typical project team?
8. How does conflict during the life of a project contribute towards its successful completion?
9. Why is it necessary to evaluate a given project?
10. What is the importance of PCTS in total project management?

Introduction

Lewis (2002:xi) has argued that although management of projects has been going on for thousands of years, the practice has been widely recognized as a discipline in its own right for only about ten years. A very short history indeed! Azzopardi (2009) confirms this view as discussed presently.

Azzopardi argues that project management has been practised for thousands of years, dating back to the Egyptian epoch, but it was in the mid 1950s that the organisations commenced formal project management tools. The origins of project management are traced in two different problems of planning and control in projects in the United States of America. One of these was to do with missile projects in the navy, where contracts consisted of research, development work and manufacturing of parts that had never been manufactured before. The project was characterised by high uncertainty, since neither cost nor time could be accurately estimated. Times of completion were based on probabilities: optimistic, pessimistic, and most likely. This led to what has come to be known as the programme evaluation review technique (PERT). Later a new methodology known as project planning and scheduling (PPS) was introduced in the private sector. PPS required realistic estimates of cost and time, and was considered more definitive than PERT. The use of project management techniques was facilitated with the advent of the personal computer, and associated with low cost project management software.

Project management is, therefore, clearly associated with industrialization. Hence there is some degree of interest in it for DE practitioners. Views held by Peters, as early as 1973, about DE as an undustrialised form of teaching and learning, form the basis for this interest.

The History of Project Management

What follows is a brief historical survey of the history of project management.

Prior to 1958

During this time, the evolution of technology, such as automobiles and telecommunications shortened the project schedule. As an example, automobiles allowed effective resource allocation and mobility, whilst the telecommunication system increased the speed of communication. Additionally, the job specification, which later became the basis for work breakdown structure (WBS) was widely used. One of the major projects during that time was construction of the Hoover Dam in 1931 – 1936.

1958 – 1979 Application of Management Science

This was the period of significant technology advancement such as the first automatic plain-paper copier by Xerox in 1959, and the rapid development of computer technology. Bill Gates and Paul Allen founded Microsoft. This facilitated the emergence of several project management software companies including Oracle in 1977. An example of a project undertaken during this phase is the Apollo project initiated in 1960 with the objective of sending man to the moon.

1980 – 1994: Production Centre Human Resources

This era is characterised by a revolution in the development in the information management sector with the introduction of the personal computer (PC) and associated computer communications networking facilities. The result was availability of low cost PCs that had high efficiency in the management of project schedules.

1995 – Present: Creating a New Environment

This period is characterised by developments related to the Internet. The facility has provided fast, interactive, and customised new medium that allows people to browse, purchase, and track products and services online instantly. Many of today's project management software packages have an Internet connectivity feature. This allows automatic uploading of data so that anyone with a standard browser can:

- input the recent status of the assigned task within a given project;
- find out how the overall project is doing;
- be informed of any delays or advances in the schedule; and
- stay in the loop for their project role while working independently at a remote site.

?? Why do you think Project Management deserves to be treated as an important element in distance education?

After your personal response, read what follows and see the extent to which your answer agrees with the discussion below.

Projects and Change

According to Eric Verzuh (2005:1):

we live in a world where change-and the rate of change-is constantly increasing. In order to survive and prosper, organisations need to continually modify their products and services. Projects are the means by which these innovations are effected. Greater change = more innovations = more projects.

There is a close connection between a given project and change, and the following must be borne in mind. Firstly, we must identify what the desired outcome of change should be. Secondly, it is important to plan the route by which we expect to arrive at the desired outcome, the resources required and the expected time it will take to complete the work. Thirdly, change needs to be driven if it is not to be haphazard, lengthy, and costly. At this point, it is necessary to define some of the terms we shall constantly keep referring to.

Important Terms

Project

A project can be defined as initiative to bring about change. This is done in order to achieve specific objectives, within a timescale, in a given context. A project is normally allocated a budget. Martin (cited in Baume, Martin and Yorke, 2002:1) specifies that project :

- has a clear purpose;
- has a clear end;

- is resourced to achieve specific outcomes;
- has someone acting as sponsor; and
- is a one-off activity that would not normally be repeated.

Paradigm

A paradigm is a belief held by someone about what a particular aspect of life is like. People will, therefore, have different paradigms or perceptions about a given project.

Stakeholders

Stakeholders is the term used when referring to the people who have an interest in the outcome of the project.

Logistics

These are the basic requirements needed to run the project successfully. For example, you cannot develop a curriculum without a budget, subject experts, students to benefit from the curriculum, and so forth.

Project Risks

Project risks are the anticipated and unanticipated obstacles that might arise in the course of a given project. A risk analysis is conducted in order to isolate the most likely ones, and involves answering the question: “What could go wrong?”

The Project Problem

The project problem can be defined in terms of the deficiency or the gap to be closed, and starts from where you are (the is) to where you want to go (the ought to be).

Milestone

The milestone is an event that represents a point of special significance in the project. Usually it is the completion of a major phase. A milestone is characterised by deliverables.

Scheduling

Scheduling is the activity of specifying milestones and assigning target dates to those milestones to ensure that deadlines are adhered to.

Project Team

The project team is made up of all those who participate in the project, and typically, members are committed to the activity of the majority.

The shortest definition of a project is one given by Juran (cited in Lewis, 2002:2). He defines it as a **problem scheduled for solution**. Lewis (2002) himself defines a project as: a multi-task that has specific performance requirements that have to be met (performance); a budget (cost); a definite starting and ending points (time); and clearly defined range of work to be done (scope). We shall henceforth refer to these as the PCTS targets of a project.

In sum, therefore, a project is a one-off scope of work, of predetermined cost, designed to bring about a change of a defined quality performance in a given time. Now work on this activity based on the important terms discussed above.

?? Read each term closely, and:

- a. explain how it relates to a DE project you are familiar with.
- b. What is the importance of performance, cost, time, and scope in managing a DE project?

The response to the first question depends on the project you are familiar with. One underlying factor, however, is that each one bears some influence. The PCTS is directly linked with the framework of any given project. The manager can, therefore, not succeed unless he/she takes into account the four components.

The Standish Group (www.standishgroup.com) offers interesting statistics about the success and failure of projects in the United States of America. This is with specific reference to software projects. It was found that:

- only about 17 percent of the projects meet the PCTS targets;
- 50 percent must have the targets changed, that is, they are late, overspent and have the performance requirements reduced; and
- 33 percent are actually cancelled.

Isn't it somewhat surprising that as many as 83 percent of projects either fail to meet targets or are cancelled altogether? If anything this state of affairs proves that it is necessary for you to learn something about project management towards a better understanding of procedures and skills the project manager ought to be acquainted with. Are there projects you are familiar with that have either failed or taken longer than anticipated in DE?

What is Project Management?

The following expectations of a project manager define the essence of project management.

- plans with the members;
- helps the team members get the work completed;
- gets scarce resources that are required;
- buffers members from disruptive outside forces;
- facilitates communication to ensure information reaches stakeholders; and
- provides leadership.

The DE project manager actually manages several integral components of a project. Among them are: communication issues, the project team, cost issues, the action plan, the scope of the project, project risks, project stakeholders, and change. He/she also manages conflicts that inevitably arise when members from different sections of the

institution come together to work on an assignment outside their normal job description. To reflect on the ideas discussed so far, work on this brief activity.

- ?? i. In what ways is project management linked to change management in an ODL institution?
- ii. How does the paradigm of a project member affect his/her participation in a given project?

A useful tool you could use to capture the essence of the new project you intend to go into is to complete a one-page form that can guide you before starting with a team. The form should be submitted to the sponsor after completing it.

The Project Case Form

Brief Background to the Project

.....

General Aims

.....

Initial Risks

.....

Expected Outcomes

.....

Benefits of undertaking the Project

.....

Initial estimates of cost

.....

Time to be taken to complete

.....

Prepared by..... Date.....

Interaction in Project Management

You may have a meticulous plan on paper, and schedule the project supported with what you believe to be a good team, but unless you interact with members with some degree of efficiency, the project will not be a success. Typically, there is discourse we associate with project management to the extent that the manager and the team can be legitimately regarded as a speech community. However, the discourse finds expression within the normal broader discourse of relationships that is known as social speech. The project speech community has a purpose and uses language to interact. Interaction can be defined in simple terms as acting upon one another, through language in order to exchange meaning and share understanding of the various stages of the project. The question to answer is: How can communicative interaction be promoted for successful project management?

The terms of reference

Embarking on a project with a group of employees in the organization without clarifying their roles can be a recipe for failure. At the very outset, it must be communicated to every team member what is happening and why. The project manager is well advised to put in writing the main ideas that will guide members. This is best expressed through a carefully conceived document known as *terms of reference*. Terms of reference should be communicated to the team at the project inaugural meeting. It is at this stage where interaction that is focused on the project properly begins. Below is an example of terms of reference. In your response, bear in mind ideas about didactic conversation raised by Moore (1973) and Holmberg (1981) as discussed in the first chapter dealing with philosophical foundations of ODL.

Sample Terms of Reference Template

Name of Organization

Project Sponsor

Source of the project (e.g. Management, capacity building, Information Technology, etc.)

.....

Project Title

.....

Name of Project Manager

.....

Terms of Reference

Roles

The roles of members of the project team are to:

- Define problem for which solution is sought
- Plan for the 4 aspects of the Project (PCTS)
 - a. Performances
 - b. Cost
 - c. time lines
 - d. scope
- Determine project stages
- Control implementation of project
- Schedule key activities (exit milestones)
- Monitor project quality
- Identify and minimise project risks
- Agree roles of stakeholders
- Come up with resolutions and implement them

Project Team Meetings

- Shall be held once every two weeks (Thursdays) unless cancelled
- Secretary shall call for agenda items in advance
- Secretary shall keep committee records in the project notebook
- Deputy Project Coordinator shall chair meetings in the absence of the Project Coordinator

Meeting Procedures

- Role players to communicate progress to the Project Manager before the date of the next meeting

- Explain complicated ideas simply.
- Speak with ease.
- Communicate convincingly.
- Bring your message to life.
- Speak clearly and audibly.
- Use pauses appropriately and powerfully.

Pause a while and say to yourself what you understand by each one of the foregoing ideas. Bearing in mind a project you are doing or intend to do in your institution.

How to Plan the Project

One of the tasks of the project manager in any organisation is to achieve the organisation's objectives through the effective management of resources, both human and hardware. This means using such resources to:

- make the correct interventions;
- do the right things;
- do the things at the right time; and
- with the right quality.

The need for the project manager to make sure that certain stages are properly planned cannot be overemphasised. To what extent do you take these views into account when managing DE projects?

Project Planning and organisation

Of all the aspects of project management referred to above, planning is probably the most crucial. Without planning, it is difficult to imagine how, for example, the project manager can determine targets, to say nothing of how he/she can convince stakeholders to buy into the project. Both well-managed and badly managed projects go through stages or phases.

a project is well managed. How do these phases differ from those in the previous figure? There are three basic considerations that a successful project manager takes into account. These are:

- Defining the problem
- Developing solution options
- Planning the project

It is worth noting that the emphasis and timing spent on a particular stage will depend on the magnitude of the task, the amount of thinking and input needed for the job.

The good manager will ensure that the team members are clear what the problem is, why it is said to be a problem, why it has to be solved, and agree what alternative solutions are at the disposal of the team. Most certainly, if there is no agreement at the beginning, the project is likely to lead to some of the most difficult conflicts. There are several barriers to good planning, namely:

- Prevailing paradigms among the members. A paradigm is what each individual member perceives about a problem. People have different beliefs about a given situation.
- The nature of human beings. It is natural for members to be skeptical about colleagues or the project itself. This is usually because of workplace politics or personality clashes.

- Competing responsibilities. Members often belong to different sections of an organisation, and their being assigned to membership of the project may be against their will. Some will most likely consider the project to be interfering with what they consider their core responsibilities in the organisation.
- Negative attitudes. These arise for various reasons, one of them having to do with taking orders from a manager who is not the member's supervisor.

Before Starting the Project

The planning should include three steps.

Step 1: Setting objectives

Step 2: Plan and organise for action

Step 3: Establish controls

Regarding risks, it is helpful to assess risks of failure relative to the schedule, the budget, project quality, and customer satisfaction. The simplest way to conduct a risk analysis is to ask:

- What could go wrong?
- What could keep us from achieving the project objectives?

It is beneficial to list the possible risks first, then think about contingencies for dealing with them. The figure below gives a template for risk analysis.

Risk analysis template

What could go wrong?	Contingency measures

During the Project

Planning during the project involves re-planning when plans formulated before project inception need re-visiting. We shall refer to that step as the implementation stage.

Step 4: Implementation

There are four implementation components that the project manager should account for, namely, direction, duration, dynamics, and discussion.

After Completing the Project

When the last milestone is reached, we say that the project has been completed. What then remains is to reflect and assess the processes from the beginning up to the end. The team should meet and answer some questions. This will be Step 5.

Step 5: Project Evaluation

This stage involves answering questions like: When was the project completed? Were the milestones and exit points completed within the target time scale? What were the main causes of delay, if any? What went well? etc.

Structuring and Scheduling the Project

Now that we have discussed the various areas of planning in a global manner, let us single out an area of management that is extremely crucial, namely, work breakdown structure (WBS). We regard project managers in DE as the drivers of the project. A Guide to the Project Management Body of Knowledge (PMBOK) (cited in Micah Mathis, 2009:1) defines WBS as:

a deliverable-oriented hierarchical decomposition of the work to be executed by the project team to accomplish the project objectives and create the required deliverables.

Creating a quality WBS requires energy, time, and people. The first point is to agree on the purpose of the project. This is captured in the project mission statement and the project vision statement. Members of the team, to ensure unity of purpose, must share these two.

Jurgen Appelo (2009), talking about the characteristics of a project mission statement observes that it should tell you about the fundamental purpose of the project, and concentrates on the present. It defines the customer and critical processes, and informs you of the desired level of performance.

The WBS should be developed before the schedule, that is, it depicts the main parts of the project. Once it is in place, the team progresses the project. Micah Mathis (2009) suggests the 100% rule, which states that the WBS should include 100% of all the work defined in the project management plan.

Once 100% of the work has been defined, you as project manager should go into the decomposition stage with the team. **Decomposition** involves breaking down deliverables in smaller chunks of work. The resulting schedule is often referred to as the Gantt chart (cf. Cassidy, 2009). It assists the project manager in identifying the tasks, the sub tasks, the target dates, etc. to be taken into account. A simplified example is given below.

Sample Gantt Chart

The Chart below gives an example of the course writing progress for the CHCT course two months after writing has begun.

	1	2	3	4	5	6
	Writing	Review by PC	Review by writer	Review by language editor	Review by content editor	DTP
Unit 1						
Unit 2						
Unit 3						
Unit 4						
Unit 5						

PC = Programme Coordinator. DTP = Desktop Publishing

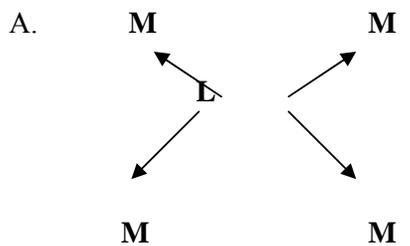
The Gantt chart shows the status of each unit after a period of two months. Unit 1 is with the PDC; Units 2 and 3 are being reviewed by the content editor; Unit 4 is being reviewed by the writer; and Unit 5 has made no progress since it is still in the hands of the writer. None of the units has reached the DTP section as planned.

?? What is the difference between planning and organizing a DE project?

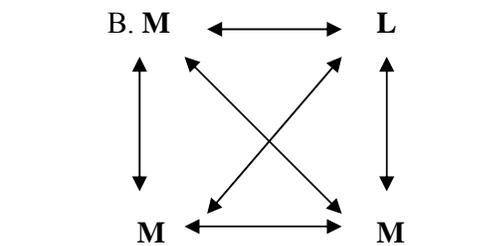
Planning involves mapping out and determining the logistics of a given project, and ensures a sense of direction. On the other hand, organization is implementational. It involves allocation of responsibilities and a determination of the various stages through which the project will go. Organisation is a sequel to planning and is reflected in monitoring instruments such as risk analysis and the Gantt chart.

The Project Team

People who work together on the project are referred to as a team. Effective communication is crucial for successful team building. There are various styles used by leaders (L) when interacting with members (M) of the team. Share your ideas with us by working on this activity. Here are two models you can follow to lead your team.



Communication happens through the leader



channels of communication are multiple

1. Which model of communication is more suitable for your situation?

A B

2. Suggest two reasons in support of the one you think is more suitable.

3. Suggest two reasons why you consider the other model not suitable.

In project management, communication within a team is necessitated by the need to complete the several tasks identified for the project (the job). Working together to complete a task is also known as problem solving.

Getting to know the individual team member

After many years working with people, the head of an organisation has come to a number of conclusions. Indicate whether you agree or disagree with him.

- 1. No two people are the same. agree disagree
- 2. People's personal interests come first. agree disagree
- 3. People want to be recognised. agree disagree

The differences among team members

If we agree that no two people think the same way, what influence does that have on solving problems or doing certain tasks? Naturally, people will think differently, therefore will give different suggestions. The communicative manager will know that there will always be different types of people, interacting differently. For example:

initiators who are good at making suggestions, and offering new ideas, but are unable to give solutions;

information givers who offer facts and opinions about a problem on the basis of their experience;

followers who go along with the group passively accepting the ideas of others. They serve as audience in the group;

harmonisers who mediate when there are differences between other members. They attempt to reconcile disagreements;

opinion seekers who ask for clarification about what the group is involved in;

critics who question ideas from team members and never want to agree with others on anything; and

co-ordinators who clarify different ideas and pull them together. Co-ordinators are implementers of suggestions.

Have you worked with any of these types of people in your team? If so, how does each type influence the way you manage a DE project?

Managing conflicts

There are six words commonly used as alternatives to the word ‘conflict’. These are: *a quarrel, a disagreement, a misunderstanding, ill feelings, differences, or being angry with each other*. Conflicts within the project team manifest themselves in various ways.

a. Conflict within the individual



The individual is in conflict with the self about an issue at work. This is referred to as inner conflict.

b. Conflict between two members of the team



Two members are in disagreement with each other, and that affects their work performance.

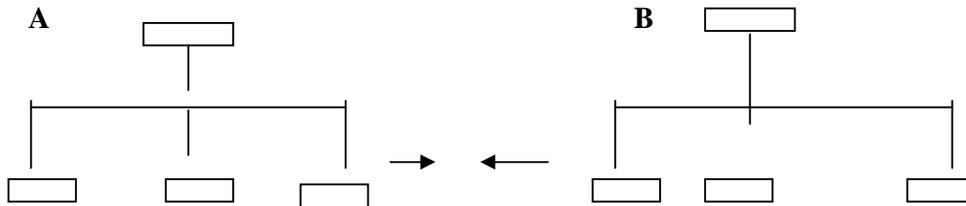
c. Conflict between an individual and the whole team.





A team member is in disagreement with members of the group.

d. Conflict between teams in the distance education institution



There is a misunderstanding between two teams.

Are there general ways of dealing with misunderstandings that can be applied to different situations? Let us examine this matter at two levels.

Level 1: Preventing conflict

The old saying that prevention is better than cure, can be applied here. The Project Manager could achieve this through planning and taking proactive measures e.g. ensuring that channels of communication are clearly defined and understood by every team member.

Level 2 : Resolving the conflict

Disagreements will often arise during the project, and the good team leader will find better ways of handling them. No matter how careful you may be as project manager, conflicts are bound to occur. Resolving conflicts can be approached in a variety of ways e.g. establishing the cause of the conflict, and bringing the conflicting parties together,

The process of resolving conflicts is better known as **negotiation**, and participants in the negotiation are known as **negotiators**. Negotiation involves communication during which choice of language is of paramount importance. To be an effective negotiator, you need to develop your language and communication skills so that what you put across is clearly understood by all.

Lientz and Rea, 2001 suggest a number of human resources issues to be consciously and carefully managed. These include: turnover of project team members; lack of commitment; lack of knowledge about the project; inflexibility by team members; failure to manage time; and over commitment by members to equally important tasks

- ?? a. What are the causes of conflict in managing a DE project?
- b. What value, if any, do conflicts add to project management?

Participants who come from different departments characterize DE projects. More often than not, they hold diverse attitudes and perceptions. Their expertise is also variable. This results in misunderstandings. Contrary to popular thinking, however, conflicts can actually be constructive rather than destructive. When handled tactfully, disagreements can lead to a better understanding of project issues.

Project Control and Evaluation

Every step we have taken in managing a given project up to this point is an aspect of control. Control implies two things, namely, power over people and the decision to make decisions.

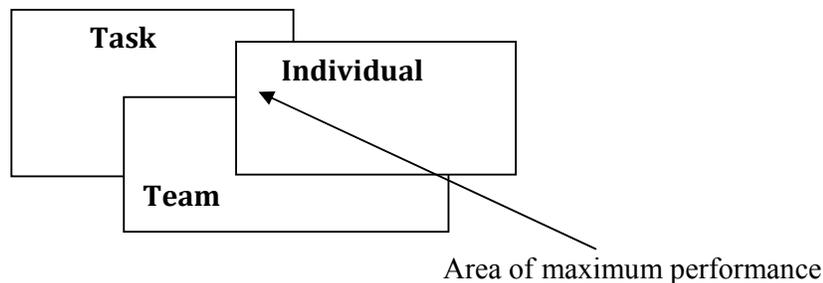
Control measures

The concept of ‘control’ has a power connotation. Control can be regarded as the act of comparing progress to the plan so that corrective action can be taken when there is deviation from the planned performance. This view of control presumes the use of **information** as its ingredient rather than **power**. That is why we talk of management information systems that can be used to achieve control in projects.

The critical issue in project control, however, is that every project team member should be in control of his or her own allocated work. We refer to this as project management at the micro level. A project manager can achieve control at the macro level only if it is achieved at the micro level. In virtually every management situation there are three basic elements to be taken into account for control purposes. These are:

- the needs of the **task**;
- the needs of the **team**; and
- the needs of the **individual**.

These needs are often in conflict, and sometimes the temptation is to let short term needs of one element overshadow the others. This, inevitably, produces a backlash later, which disrupts all three elements. It is important for the manager to keep all three in mind at all times, especially when planning. The priorities for each situation should be assessed accordingly. For a fact the needs of the three elements will seldom coincide, so it is incumbent upon the manager to ensure they overlap if the project is to be a success. The figure below portrays the ideal scenario.



It is where the needs overlap that we have the area of maximum performance, and the successful manager needs to carry out activities in each of the three areas. The activities could be as follows.

?? With reference to an example of a DE project, explain challenges that can be faced by a well-meaning manager with reference to the control function.

The example of offering a programme on-line readily comes to mind. Some members will be familiar with the print medium, while others will be more familiar with the new technologies. Unless some form of intervention is given, the manager will find it difficult to control two categories of members both with different levels of knowledge.

Project Evaluation

Evaluation of the project is planned for right from the onset, and is ongoing as the different milestones are tackled. The type of evaluation that goes on during the project has been referred to as **formative evaluation**. It is said to be formative because the project is in the process of being formed. This distinguishes it from the evaluation conducted at the end of the project, commonly referred to as **summative evaluation**. It is said to be summative because the project is being summed up or closed.

To evaluate a project is to attempt to determine whether the overall status of the work is acceptable in terms of intended value to the target customer once the job is finished. Project evaluation provides the basis for management decisions on how to proceed with the project, and appraises the progress and performance of a job compared to what was originally planned. It is through the project process review that evaluation is enabled. This is usually conducted at major milestones throughout the life of the project. During the process review, lessons are learned about the project.

Managers who engage in project management have often asked how best to conduct project evaluation. The form given below can be used for that purpose.

Project evaluation form

Item	Information obtained
1. Did we meet the target time scales?	
2. What did we learn about scheduling that will be helpful in the next project?	
3. Did we meet our budget targets?	
4. What did we learn about budgeting that will help us in the next project?	
5. Upon completion, did the project output meet client specifications without additional work?	
6. If additional work was required, what was it?	
7. What did we learn about writing specifications that will help us in our next project?	
8. What did we learn about allocating responsibilities that will help us in our next	

project?	
9. What did we learn about monitoring performance that will help us in our next project?	
10. What did we learn about making changes and taking corrective action that will help us in our next project?	
11. What technology was used to make the project successful.	
12. What tools and techniques were developed that will be useful in our next project?	
13. What recommendations do we have for future research and development?	
14. What lessons did we learn from dealing with service providers and outside suppliers?	
15. If we had the opportunity to do the project again, what would we do differently?	
16. What did we learn about interpersonal relationships?	

Rescuing ailing projects

There are two types of projects in any situation – those that are getting better, and those that are dying. A project that stands still is dying because it is ailing. The ailing state of a project is dependent on how it is managed.

Do you agree?

s

Why do you agree or disagree? Answer that before reading on.

When we examine what makes distance education projects fail or succeed, we are actually looking at a variety of success measures that can keep our projects healthy, or offer remedy when they start to ail. As a form of prevention, using these measures from the very beginning will make our projects considerably more successful. Such proactive measures will avert many potential snags stemming from mixed communication signals, ignored problems, and unrealistic expectations that can lead to the collapse of the project. Sharon Anderson has outlined some of the characteristics of projects that are candidates for failure.

- The project scope may not be well defined, e.g. members may not be clear what contribution the stakeholders should make in the development of a particular programme.
- The project might be lacking change management approaches, e.g. how to prepare stakeholders who are not convinced that counselling of clients is necessary.

- The project fails to get buy-in from the right stakeholders, e.g. developing a course that is too difficult for the target group.
- The project may not have the right resources available.
- There is workplace politics that interferes with the management process, e.g. when members of the project team do not have the support of their supervisors.
- The project fails to plan for risks or develop contingency plans.

The question, however is: how do you as manager, recognise a project that is in trouble. There are red flags or mischiefs to watch for right from the outset. Some of these are:

- rampant schedule delays and missed commitments;
- the project is under-budgeted for;
- there is evidence of low morale and a lack of teamwork that intermittently plagues the project members;
- there is no clear direction as to where the project is headed or when it will get there; and
- members have issues that they think are critical to their participation unresolved.

But the million-dollar question is: How do you rescue a troubled project? There are four vital success measures that you can take, but we want to share them in the form of an activity.

Measure	Action that can be taken
1. Investigate the current situation	review project documentation
2. Assess and re-plan the project	verify and validate the project objectives
3. Re-set everyone's expectations	remove obstacles where possible
4. Aim to deliver as per the new plan	Do what you say you are going to do

It is presumed that by taking into consideration ideas raised presently, it is possible to rescue an ailing project and bring it back towards the route for success.

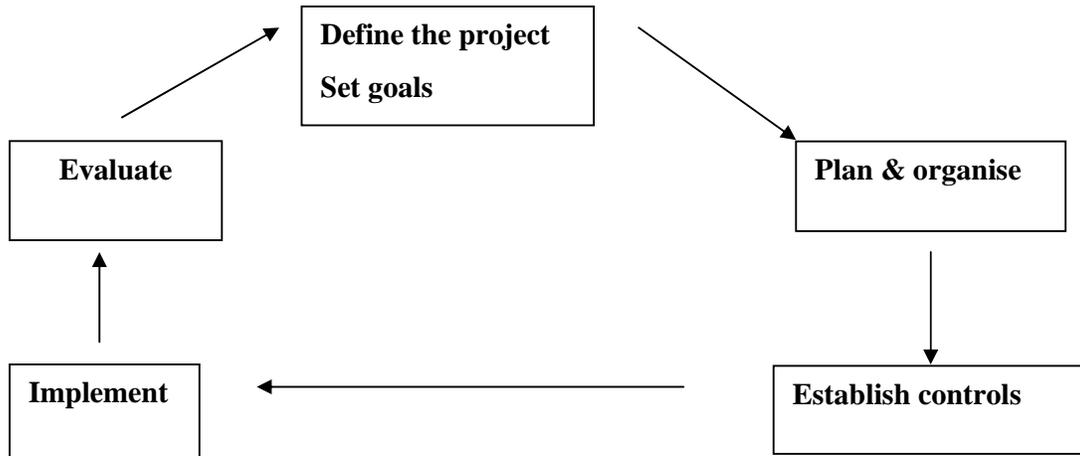
Project closure

You will recall that among the PCTS formula, time is of essence in project management. This means there is a definite end when the defined project outcome is delivered. At this point, the project needs to be brought to an end, or closed down. Its resources, both people and technology, need to be released and reallocated. The project should be allowed to close, and a final meeting for the project team members ought to convene to formalise the closure. Thereafter, if the project was to develop a marketing model, or to set up quality management systems, for example, subsequent activities of monitoring should not be regarded as continuation of the project. At the

point of closure, it is time for you to congratulate yourself as a manager, and the project team for having self-actualised!

To sum up, getting to the successful stage, you will have been following this cycle.

The project cycle



Summary

Now go through the following checklist that can be used to ensure compliance with key aspects of a given project. Tick in the appropriate box. This summarises the main areas covered in the chapter.

Tasks	Done	Not done
1. Project was clearly defined		
2. A strategy was selected		
3. Specifications were developed		
4. A schedule was developed		
5. A budget was put in place		
6. The project team was organized		
7. Duties and responsibilities were assigned		
8. New team members were trained		
9. Progress was monitored		
10. Corrective action was taken		
11. Feedback was provided		
12. Final outcome was tested		
13. Outcome was delivered to client		
14. Operating manual was written		
15. Client personnel was trained		
16. Project staff was reassigned		
17. Surplus resources were disposed of		

18. Facilities were released		
19. Project performance was evaluated		
20. Final audit was completed		
21. Project report was written		
22. Project was reviewed with management		

Challenges

Some of the challenges linked with following the project management approach include:

- the lack of knowledge and expertise on how to run projects;
- inadequate funding that is often needed to implement the project;
- lack of time to convene participants from the different sections of a given institution;
- and
- Communication challenges that interfere with professional interaction.

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Chapter 5

Key Perspectives in Supporting the Open and Distance Learners

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Some Questions

What are the motivational needs of open and distance learners?

What are the expectations of open and distance learners?

Is learner support a 'one size fits all' affair? Is there scope for individuation?

How can ODL practice empower the learner to take control of his/her studies- learner autonomy?

How can ODL practice enhance learner academic integration and social integration ? (Tinto's (1975) Model of Student Retention)

What is the role of a study circle?

What interventional strategies can ODL institutions put in place to support the learner?

Why should ODL students be supported in managing their multiple roles?

What constitutes comprehensive learner support?

How can Information Technology be utilized to support open and distance learners?

Introduction

Learners in open and distance education like other students require support and motivation in order to pursue and complete their studies. Möwes (2005) contends that an important measure of the quality of a distance education system is the analysis of the learner support provided. Learner support is to be viewed as an integral component of the process of open and distance learning (ODL). Möwes (2005:135) asserts that:

support systems developed in recognition of students' needs, help the distance learner become competent, self confident in learning, social interaction and self evaluation.

Also, Wheeler (cited in Möwes, 2005) substantiates that distance learning is not just a move away from learning in the classroom but a complete paradigm shift-a change in the fabric and culture of education.

Literature on learner support (Lamb and Smith, 2000; Mills and Tait, 1996; Rumble, 1993) bears conviction that learner support can personalise and humanise ODL. Learner support systems for ODL include a mixture of traditional, technical, socio-cultural and political-critical perspectives of the learner and of his/her operational environment. Indeed learner support takes place at a variety of levels but in an orchestrated manner that motivates and sustains learner effort towards course completion.

The background

Learning support is a subset of learner support. The purpose of this chapter is to understand the conceptual and theoretical frameworks that underpin learning support in distance learning in order to improve learner support provision and practice. Learner support appears to be of lesser concern in some distance learning institutions as planning strategies for learner support do not exist (Levy and Bealie, 2003, Robinson, 2004). An absence of such plans could imply that issues related to learner support may not be known. This could be due to several constraints, such as financial cost, inadequacy of appropriate human resources for learner support or, alternatively, the role of learning support may not be considered a matter that deserves attention.

However, literature describing learner support as provided in developed contexts is prolific and differs from what happens in developing contexts. In the latter case, available literature comprises mainly of progress reports on what various institutions are doing (Robinson, 2004). For instance, Nonyongo and Ngeengebule casebook (2008) on learner support in Distance Education Association of Southern Africa (DEASA) institutions except for a few empirical studies is primarily a collection of progress reports produced by ODL practitioners. It is against this background that views about learner support are shared.

Affective, Cognitive and Systemic perspectives

There are a number of learner support levels and perspectives, which ideally inform service delivery in ODL. In this section we shall focus on three levels of learner support, which are: the affective, the cognitive and the systemic levels. It is important to note that these levels are not mutually exclusive but in a way present overlaps.

At the affective level we look at the motivational aspects that spur the learner into productive learning activity. Here, we see the function of learner support as to provide an environment, which supports students, creates commitment and enhances self-esteem. The orientation and induction of new students should essentially focus on the affective element of the learner support strategy. At the cognitive level, support is required to mediate the learning process. At this level we focus on the suitability of the learning materials and the face-to-face tutorials in bringing the material into levels and structures for the easy understanding by the learners. The last level of student support is the systemic aspect. At the systemic level, we focus our support on the structure of the institution's provision for student service. There should be a system of services readily accessible to students for their various needs. The system should be user friendly and efficient. The functions of the systemic element of student support are to establish administrative process and information management systems that are logical, effective, transparent and user friendly. As you can see, learner support strategies are varied and many and they take cognisance of the learner's operational environment at the cognitive, affective and systemic levels.

?? How is affective learner support different from the cognitive level learner support? How can you improve systemic learner support at you institution? Discuss!

Learner expectations perspective

It is essential that in seeking to support learners in ODL we should always seek to meet their expectations. It is therefore pertinent that even within the first tutorial class, an ODL practitioner should ask the learners this question: 'What are your expectations of this course/programme?' The learners will then relate their expectations so that you have an idea of how to meet them. Of course, some of the expectations will be way out, while others will be far-fetched and yet others quite realistic. As a good ODL practitioner, we expect you to bring students' expectations closer to a point where they are responsive and aligned to the objectives of the course.

Sometimes, learner expectations are informed by the environment, which may be structural or social. Structurally, some learners embark on ODL programmes in order to meet the expectations of employers and in order to meet the requisite qualification

that makes them eligible for promotion. On the other hand, an expectation to gain social acceptability and recognition may drive someone to join a programme. These push-pull factors are quite critical for both the ODL practitioner and learner. May we point out that, sometimes the expectations are motivated from within the individual. The need for self-actualisation as pointed out by humanistic theories is a case in point. It is known that there are people who join ODL programmes for the sake of filling an internal gap, just for the sake of it. Intrinsic motivation is a key factor documented in most psychology of learning books.

Expectations of ODL students on cognitive, affective and systemic level are of critical importance to the ODL practitioner. It is not unusual that the practitioner can be called by the learner at an unsociable hour like 12 midnight or 4.00 a.m. In ODL, the student, expects a twenty four hour - seven days a week service. The learner is hard pressed for time and 'any time is tea-time'. For some of them, it is the 'just in time service' required, while other learners are comfortable with personalised service. Learners in ODL expect integrated information service delivery that will meet them at their point of need, that is, not too early and not too late but just in time! The practitioner will do well to manipulate the 'push' and 'pull' reinforcers to manage students and their expectations. Push factors may be in the form of reminders, relevant information and the pull factors may be built on positive remarks of work done and pleasant promises when work is done. One may be tempted to think that such reinforcers work with the face-to-face mode only but research has shown that the motivational needs of ODL students are not different from those of conventional classes (McNickle, 2004).

We have underscored the need to support ODL students at the cognitive, affective and systemic levels in order to enrich their learning experiences.

?? i. What expectations do learners in ODL have?
Why is it critical for an ODL practitioner to have an understanding of the learners' expectations?
iii. Can we sideline learners' expectations and succeed?
Reflect!
. Why does McNickle suggest that the motivation needs of learners in ODL are just the same as those of other learners?

Comprehensive learner support

How do ODL students access a comprehensive learner support? It is important to note that learner support for ODL students is an indispensable aspect that determines, student throughput and increases student retention (Chadibe, 2010). Learner Support is therefore a planned and well-structured programme that is integral to the whole service delivery in ODL. As alluded to, learner support key perspectives focus on the pedagogical aspects, social management and service delivery processes. Chadibe (2010) alluded to academic support through a network of community learning centres

and satellite centres. Holmlberg and Moore (cited in Chadibe, 2010) refer to two distinctive characteristics of ODL. The first characteristic is, “the preparation of learning materials which are structured, progressional, paced, and using appropriate educational technology, which are separated in time and space from the learners” (Chadibe 2010: 2). The second one is, the mediation role in the pedagogical process which takes place by facilitating and sustaining a subjective dialogical process through comprehensive learner support mechanisms. Stewart (cited in Chadibe, 2010:6) outlines the following services as requisite learner support at a learning centre,

- ❑ Class teaching at study centres
- ❑ Tutorial or mentoring at study centres other locations
- ❑ Study or self help groups
- ❑ Social events
- ❑ Counselling sessions at the study centres
- ❑ Correspondence with tutor and counsellor
- ❑ Group telephone tutorials
- ❑ Radio tutorials
- ❑ Audio cassettes “correspondence”
- ❑ Computer mediated communication
- ❑ Student newspapers / newsletters

The whole idea of learning centres is to assist learners find a formula of taking control of their studies and appreciating the learning materials. Of critical importance is that tutoring and not teaching is practised, thus, dissuading learners from rote learning. Learning centres and community satellite centres help in bringing a comprehensive milieu of learner support services for the benefit of learners in ODL.

What are the key aspects of a comprehensive learner support programme?
 What support did you get when you enrolled in the ODL practitioner’s course?

Learner Stage Perspective

Learners in ODL are by no means a homogeneous group (Dzakiria, 2005). Their needs and expectations are different because of such variables as the environment, the levels in the programme, the intellectual capacity and potential and the level of support and or motivation. In this section we shall briefly look at the learner stage as a perspective of learner support. The learner stage is viewed as the stage at which the learner is in the cycle of his/her study programme. For example, the learner who is in his/her last semester of the programme could have different support needs than the one who is just starting. In this section we shall look at four different levels, which are, the prospective learner, the enrolling learner, the enrolled learner and the graduating learner. Each of these categories of learners has different needs, hence the support should be different. McNickle (2004) suggests that we as practitioners should step out of our comfortable areas of expertise, and professionalism in order to gain a full understanding of what the learners experience at the different stages of their learning cycle. Let us briefly reflect on our college time. Did we have the same needs throughout or was there a shift in our needs? We are sure that you experienced a shift in learning needs, which supports the notion of learner stage specific support. Let us turn to the learner stages suggested for this section which are,

- ❑ the prospective learner

- the enrolling learner
- the enrolled learner
- the graduating learner

Prospective learner

The prospective learner is one who is not yet enrolled but someone just making enquiries about programmes on offer as well as seeking to know more about your college. At this stage, the prospective learner requires access to a full range of services so that he/she selects the best course for his/her needs and also understand the job prospects on completion of the course as well as the expectations of the programme. Such a prospective learner, requires the pre-registration services as outlined below:

- Career advice / counselling
- Course information
- Course advice
- Miscellaneous information about fees, scholarships, financial assistance and
- Recognition of prior learning
(McNickle, 2004:3)

The services outlined above are only required by prospective students and not by enrolled or graduating students. Appropriateness and suitability of the kind of learner support given is a critical variable in ODL.

Enrolling Learner

The enrolling learner is one who has made a choice to be part of the college and is now taking steps such as, registration process in order to belong to the college. The nature of learner support at this level is quite different to the one required by either the prospective learner or the enrolled learner. At this level learner support should focus on things that might be a barrier to learners' access to requisite knowledge and skills. The enrolling student according to McNickle (2004:4) requires the following support services;

- Enrolment /registration procedures, documentation and forms
- Payment of fees
- Helpline for enrolment and
- Alternative services for accessing loans

It should not be assumed that, the enrolling learner understands all about the registration process. Prospective learners need a lot of assistance in the registration process. For example if you went to the medical centre for examination, can we expect you to know every procedure? When to roll your sleeves for blood pressure or when to lie on the bed for body and organ function medical examination? Not at all! You still need instructions and prompts in order for you to be at the right place and doing the right thing in that medical environment. The enrolling learner is exactly at this same level where he/she needs support to get through the registration process in an ODL academic environment. Remember that for some learners this is the first time they become students again after a long time from a learning environment.

Enrolled Learner

The enrolled learner is at the stage where he/she is ready to start on a programme of study. Learner support should take note of pre-requisite skills, short term and long term goals and the support services available. Even at this advanced stage there are still some grey areas for which the learner needs clarification and support. An induction and orientation programme, is always critical at this stage so that the learner gets to understand all services that he/she can access in times of need. Sometimes, it may be necessary to take a functional test so that each learner's operational level is documented and appropriate remedial measures taken to enhance his/her efficiency. The assessments should focus at things like the literacy level of the learner and numeracy level especially where it is a requisite such as in Accountancy, Mathematics, Statistics and other quantitative programmes. A comprehensive induction and orientation process enhances success opportunities for students. Also the orientation programme should give an array of available services and contact so that no learner is left behind nor frustrated by the college. The benefits of establishing contact even by telephone or e-mail are maintaining motivation and reducing frustration.

Graduating learner

The graduating learner is one who has completed a study programme and is looking forward to get an opportunity to use the knowledge and skills learnt at the college.

McNickle (2004:5) suggests that the graduating learner needs information on:

- Career destination
- Job search skills
- Resume development
- Interview skills
- Agency skills
- Opportunities to contribute to a relationship with their college (ALUMNI)

The graduating learner requires learner support that is quite different and often is about preparing the graduand for transition to the post college world. Issues such as attending interviews, department and professional outlook add value as life skills for the graduating learner.

Many authors on learner support in ODL argue against a 'one size fits all' strategy. How does the learner stage support perspective confirm the assertion by these authors? Is there room for individual help in ODL?

Academic and social integration perspective

Tinto (1975) proposes a model for the students' retention, which focuses on two aspects. These are the academic integration and social integration.

Academic integration is characterised by how the learner interacts with the faculty staff and peers as he/she interfaces with the learning materials. According to Tinto a student who feels himself/herself as an integral part of the academic material, is well motivated to pursue his/her study. On the other hand, a student who does not feel part of academia has low motivation and as such may find it difficult to remain in the programme nor to complete his/her study programme. Academic integration encompasses the complexity of interactions with the learning materials, tutors and the entire pedagogical process.

Social integration, on the other hand, looks at how the learner interacts with his society and in particular the society of learners. The interaction while it is at the social level is critical in supporting the learner to manage his studies. By interacting socially with other learners the individual gets to know the expectations of the programme, the set deadlines that he has missed, how others have done the task and, most importantly, what synergies and strategies they can put in place to make learning easier and more enjoyable. Beaukes (2005) noted that the major impediment of rural students in Namibia was isolation. Isolation and loneliness, experienced by the learner, impact negatively on the requisite social integration to the society of learners (Dzakiria, 2005). Beaukes recommended that, it was imperative for University of Namibia rural distance learners to form study groups in order to maintain the necessary motivation and overcome other study problems. The learner should also, remain integrated in his community as he needs the community, especially the immediate family, to support him/her in managing the social affairs and the study programme. Learners in ODL draw a lot of motivation from the social background, this is why most of them dedicate their research projects, dissertations and or thesis to their spouses or child or parents. Maintaining supportive social networks is critical for success in an ODL academic programme.

In ODL practice, orientation of new learners is incomplete without putting emphasis on various aspects of academic integration strategies and management of social obligations, commitments and support. If you reflect on your life as an ODL learner you can pick examples of academic and social support strategies that helped you get through your study programme. Inherent in the academic interaction and the social networks is the motivation required for a sustained and protracted course of study. Tinto's (1975) model helps us appreciate the nature of a comprehensive learner support. Both academic integration and social integration help the learner access comprehensive learner support systems.

From this section you can see how the learner stage perspective in learner support differentiates the nature of service according to the changing needs of the learner. Solochech (2002:1) agrees that "there is a difference in how you handle the first time student and on-going students."

- ?? a. What are the positive aspects of social integration?
- b. What are the negative aspects of social integration?
- c. Can student retention rate increase learners' success?
- d. How do learners in ODL get academic integration when they do not often have a campus?

Learner- centred perspective

The learner-centred perspective assumes the readiness of learners to take control of their learning and that learners have enough motivation inherent in themselves to sustain a programme of study and succeed. In this regard, learner support is required to focus on the individual's needs, challenges and potential. Combs and Whisler (1997:1) define learner-centred perspective as "The perspective that couples the individual learner with a focus on learning." The individual learner in this definition is seen as the totality of the person's attributes which includes their heredity,

experiences, backgrounds, talents, interests, capacities, needs and perceptions. The other aspect of this definition, which focuses on learning, encompasses the learning process and the effective instructional practices that maintain and sustains the learner's motivation.

The learner-centred perspective is a reflection of the child centred approach to teaching (Humanistic Psychology), where the learners actively control what they learn while the teacher takes a facilitative role. In this approach, the learner's unique characteristics and needs form the framework of educational programmes. Combs and Whisler (1997) posit that the educators need to give priority to the learner's reality and to support the learning needs and capabilities. The learner centred perspective demands that any learner support that is given should be done within the framework of the learner's needs. In this shift, the learner then takes active control of his/her learning. ODL gives adult learners the greatest possible control over their learning with regard to pace, place and time of learning. Autonomy in this regard does not translate to independence as this would contradict what we said earlier about students' low performance due to isolation and loneliness. In ODL, we talk of interdependence rather than independence. Ehlers (2004) reporting on quality in E-Learning from a learner's perspective noted that a learner focused quality concept has to be more comprehensive than just instructional or technological interface. While tutor support was found to be critical in quality e-learning, the learners differed on what that tutor support was all about. Ehlers (2004) agrees with the learner centred perspectives by alluding to the fact that future quality development in e-learning should be oriented to the learner's needs and situation

In this section, we noted that learners in ODL, while they appreciate the learner centred perspective, do not require complete autonomy but need tutor support in a variety of levels which is oriented to their needs. It can be argued, therefore, that learner-centred approach does not at all translate to learner's independence.

How has the person-centred therapy approach by Carl Rogers influenced the provision of learner support?

ii. Why is it critical that learners define the support they require?

Multiple roles perspective

Most learners in ODL are adults who already carry an overload of other roles. The multiple role perspective views learners in ODL as having a multiplicity of roles, which may compete invariably with their studentship. Such roles may include being a spouse, a mother, a professional or worker and having other roles in the community or the church. The complexity of the interplay of these roles have a strong bearing on time management in order for the learner to effectively attend to his /her studies. Badza and Chakuchichi (2009) point out that due to pressure of competing roles on their time, women found it easier to utilise study groups, collaboration and networking. Other studies (Evans 1995; Compora, 2005; Nyakutse, Biswalo and Maduna, 2009) found that learners in ODL had multiple roles and had problems in time management and managing the roles so that they do not squeeze out the study

programme. The challenges of multiple roles of ODL learners were spousal roles, maternal/paternal roles, professional roles and social roles, as illustrated in the following quotations,

As a woman I have got a lot of responsibilities at home such as being a wife, a mum to my kids and all the other household chores and still having to cope with my studies.

The presence of social issues like sick children.....presence of visitors at home during times of studying

Being a mother, a worker and home owner and then being a student.
(Badza and Chakuchichi 2009:62).

The multiple role perspective is critical in understanding the ODL learner's, needs, challenges and perceptions. An appreciation of these aspects of the learner creates a stronger platform for appropriate and comprehensive learner support service delivery in ODL. The multiple role perspective calls for a shift in pedagogy to include andragogy and feminine pedagogy (Badza and Chakuchichi 2009; and Nyakutse, Biswalo and Maduna 2009). Andragogy refers to instructional methodology suitable for adult learners.

?? i. Why do ODL learners need counselling in managing multiple roles?
ii. How do study circles solve multiple role challenges?

Write an orientation paper where you assist learners in ODL to be aware of as well as to effectively manage multiple roles.

Interventional strategies

The multiple perspectives discussed above present challenges to learner support in ODL. It is therefore important to explore how we can mitigate some of the challenges in the framework of learner support. The strategies listed below form part of a milieu of targeted support to enhance students' motivation and success rates in ODL.

- Utilising the study guide
- Utilising study circles
- Mentoring at risk students
- Supportive finance schemes

Utilising the study guide

The learners in ODL require a study guide that gives them information regarding studying and going through a programme. The study guide should inform and motivate the learner. It should remain a reference point for the learner until he/she completes the studies. In fact, in his study McNickle (2004) reported that learners indicated that they needed study guide material to be availed in various formats, such as the hardcopy, CD Rom, and online information which can be disseminated during orientation programmes.

Information in the study guide as indicated by students in McNickle (2004) study should include these aspects:

- Induction / orientation information
- Academic information including course requirements, aims and contact details
- Assessment- due dates and requirements
- System of acceptable referencing
- Study skills- how to study, essay writing skills, and referencing
- Time management skills
- Information Technology support and contacts
- Career counselling services
- Personal counselling –contact detail and synopsis of services
- Academic resources – library and e-resources
- A full range of services available to learners with contact details.
- Internet facility

A study guide should be a comprehensive document with all the required information. Supplementary information could then be conveyed through tutorial letters.

Utilising study circles

The importance of study circles cannot be overemphasized as an innovation of learner support. Shin and Kim (1999) assert that study groups seem to exert psychological and /or socialising function as learners encourage one another and share concerns. Shin and Kim suggest that the socialising aspect of study circles appears to have some link with persistence. Choi *et al* (cited in Shin and Kim,1999) showed that, learners forming a distinct study circle had higher programme completion rates than those who worked as individual independent of other learners. Shin and Kim (1999) tend to agree with Tinto's model of student retention, where social integration is conceptualised as "notions of both levels of integration and of degrees of congruency between the individual and his social environment." Kember (cited in Shin and Kim, 1999:89) also views the social integration factor as made up of the emotional encouragement component and the external attribution component caused by the work, family and social lives of students. It is understood that learners in ODL need understanding or support from those around them in order to pursue their studies and meet the expectations of their significant others. The phenomena of social integration hold a lot of potency for the vindication of study circles as an essential learner support strategy.

Mentoring at risk students

In an effort to increase student throughput and completion rates, weak students could be identified early and be accorded remedial measures to help them cope with the demands of the study programme. The remedial measures could be in the form of bridging courses, extra tutorials and mentoring. Mentorship requires that identified weak students be supported by a mentor who guides them by regularly meeting them and guiding them to important concepts and knowledge. The mentor need not necessarily be a subject expert but someone knowledgeable in ODL practices.

Supportive finance schemes

In a study of ODL student retention at the Zimbabwe open University Chakuchichi (2010) found that affordability of fees was an important indicator of student retention. The problem faced by institutions would be how to balance students' fees affordability and charging institutional viability fees for sustainable development of the institution itself. A strategy of negotiating students' self financing schemes such as *eduloans* and other initiatives may help to keep both students and institutions afloat. It is quite critical that learners in ODL, have access to loans in order to finance their studies. These loans would ensure continuity and better programme completion rates. Supportive finance schemes are critical in creating opportunities for learners whose economic base is unstable.

- ?? i. How do learners in your institution get to finance their studies?
- ii. Are there some who are left behind for lack of funding?
- iii. Create an inventory of items required in establishing a learning centre for your institution?
- iv. Develop a study guide from the learner centred perspective.

Conclusion

We noted that learner support includes a mixture of traditional, technical, socio-cultural and political-critical perspectives. Some of these perspectives are, the learners expectations, the learner stage, the comprehensive learner support, the academic and social integration and the learner centred approach. For instance in the learner expectations perspective, learner support should desire to address the expectations of learners. In order to address the comprehensive learner support perspective, learning centres and community satellite centres help in bringing a comprehensive milieu of learner support to the learner's door-step. In the learner stage perspective the focus is in bringing support to match the prospective learner, enrolling learner, enrolled learner and the graduating learner at their point of need. We emphasized that both academic integration and social integration were found to be helpful in addressing learner access to comprehensive learner support systems. Study circles were seen as a practical way of supporting the social integration of learners. We further, noted that, a learner centred perspective demands that any learner support that is given should be done within the framework of the learner's needs, challenges and potential. An appreciation of these perspectives creates a stronger argument for appropriate and comprehensive learner support in ODL.

Challenges

There are numerous challenges faced by ODL institutions in Southern Africa in the attempt to provide more effective and efficient learner support services. The following have been noted in the different organisations.

- There are vast transactional distances in most of the countries, and reaching them is problematic.
- There is limited funding to acquire Information Communication Technologies that would help in annihilating the distances for efficient provision of tutorial services.

- Where the appropriate technologies are available, institutions either run short of expertise to utilize them, or there may be no electricity for gadgets like computers in the remote areas.
- Many of the practitioners in ODL lack training in the field, so their capacity to teach is limited.
- In most cases part-time staff are hired to support learners. These are fully employed elsewhere, and the result is that their commitment to learner support may not be total.

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Incorporating Relationship Marketing as a Learner Support Measure in Quality Assurance Policy for Distance Education at Makerere University, Uganda

CHAPTER 6

Communication and Study Skills in Open and Distance Learning

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Some Questions

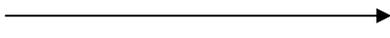
1. What is communication?
2. What is the communication process?
3. How do students and tutors communicate in ODL?
4. What study hints do learners need when approaching a module as a distance learner?
5. What are the important aspects needed for one to study effectively?
6. Which is the appropriate time of the day for a distance learner to study?
7. How does an understanding of the grading system used in an institution help one to study more effectively?
8. How does a conscious mastery of listening, speaking, reading, and writing help the learner to communicate and study better?
9. Why should one be encouraged to set goals and priorities when embarking on a programme?
10. What is the significance of time-tabling and time management?

Introduction

Studying for the diploma or degree qualification makes unique demands on you, and should be approached with that awareness. For one thing, the way you studied for your previous qualification may have worked then. This is probably because you were doing your studies full time and had the opportunity to benefit from teachers and fellow students with whom you were in constant touch. Even if you will be studying full-time, there is need to review how you study if you are to survive the studies. Clarity about how to communicate successfully and what study skills to apply is a necessity. Embarking on the programme is an opportunity you cannot afford to take lightly.

This chapter is mainly about academic counseling and aims at actually counselling you on academic issues to do with communication and study skills. These are broad areas, which are addressed by examining specific issues. Let us begin with the basic question: What is communication?

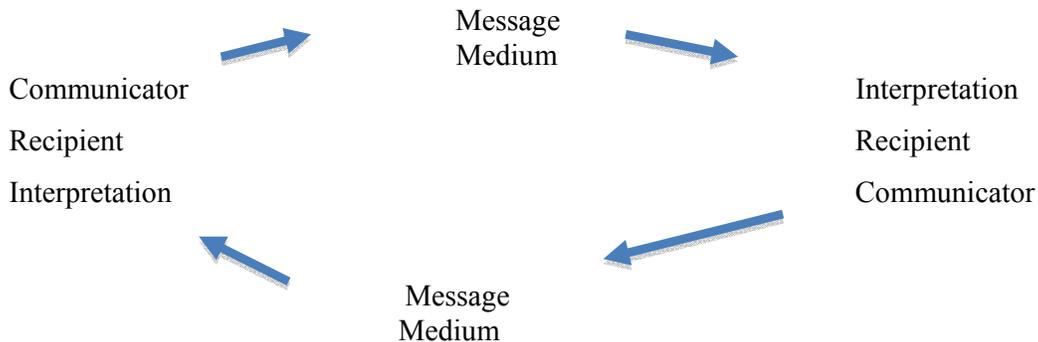
Communication is the sharing of information. This can be by writing, speaking, reading, and listening. Some scholars (e.g. Shannon and Weaver, 1949) define it as a one way process and in which the sender communicates with the receiver. This is a situation whereby the sender is solely the source of information. This can be demonstrated by the drawing below:

Sender (Transmitter)  **Receiver**

Another definition of communication is that it is a two way process where by people exchange views and there has to be feedback (Cleary et al, 2002., Fielding, 2006 defines it as a transaction.

What happens in a distance education transaction? There is exchange of information. As a result there has to be two parties for the exchange of information to take place. A good example is when a distance learner writes an assignment and sends it to a tutor, and the tutor has to give feedback. Suppose there was no feedback, how would the learner feel? Obviously, the communication process would remain incomplete. The ideal communication process is best illustrated below.

The Communication Situation



In this model, the communication situation is dynamic. Both communicator change roles all the time, just like what happens during a face-to-face tutorial, or when the learner sends an assignment for marking.

?? a. Which of the two models of communication described above do you think the distance education practitioner should encourage?

b. Suggest reasons for your choice.

Research has shown that students who go through a skills course tend to do better in their studies. We now share some of the findings obtained from research with students and lecturers in SADC ODL institutions. Examine them carefully, and evaluate how these reflect some of the challenges in your particular situation. Students:

- had difficulties coming up with strategies to improve study skills;
- lack a broader understanding of the importance of a personal study timetable;
- expressed inability to distinguish between academic and non-academic language;
- showed a limited understanding of how attitude and motivation account for successful study;
- were not clear about the different purposes of listening;
- did not have enough information about how active oral participation can facilitate learning;
- were not clear about the different types of reading and their purposes;
- experienced challenges with sentence construction, choice of appropriate vocabulary, and spelling words correctly;
- experienced difficulties with the citing of references;
- had challenges with interpretation of assignment topics;
- were not aware of the importance of editing their own work before submitting it for marking;

- did not know what the different reading skills are, and how they are linked with types of questions asked;
- were unaware of the importance of seminars in their studies;
- expressed concern about ways to prepare for examinations; and
- had difficulties coming up with research topics, and how best to conduct research.

The ideas about communication and study skills, which you are going to interact with are based on the foregoing research findings. The primary objective is to enable learners to handle studies competently.

Practice makes perfect

To learn how to swim, you must swim! So, to learn how to communicate and how to study, the distance learner must actually communicate and study. To communicate proficiently, he/she must develop a sound command of the language. Unless you use language more consciously, it will be difficult to improve the communication and study skills required in the subject you are specializing in. In a given study programme, practice consists of listening, speaking, reading, and writing in response to the organized activities, self assessment exercises, assignments and tutorials.

Assignments and examinations

Learners will either receive a tutorial letter specifying due dates for assignments, or that information will be communicated. at the induction tutorial. The other information the student should be familiar with includes:

- the structure of the course as spelt out in the Regulations;
 - the number of modules per course;
 - the time taken to complete a module;
 - the number of hours for face-to-face tutorials;
 - the number of assignments per course;
 - the examination;
 - the weighting of the assignments and examinations towards the final grade;
- and
- the duration of the course.

Grading

You should familiarize yourself with how your institution grades written assignments and examinations. In this respect, institutions differ in the way they grade. Specifically, there are three ways of grading, which will be referred to as 1, 2, and 3 below.

1	2	3
Distinction - 80%	1 (First class)	A (A+, A, A-)
Merit - 70%-79%	2.1 (Upper second)	B (B+, B, B-)
Credit - 60%-69 %	2.2 (lower second)	C (C+, C, C-)

Pass	- 50%-59%	3 (Third class)	D
Supplement	- 40%-49%	Pass	E
Fail	- 0%-39%	Fail	F

?? Why do you think information about assignments and examinations, and that about grading is important to the distance education student?

The study module

The following is useful information the student should be familiar with.

- The module contains the content to be studied, the activities, and self-assessment exercises.
- Although it is said to be self-contained, the module cannot be exhaustive, so it is prudent to supplement it with recommended reference books. These are usually given at the end of a unit, or at the end of the whole module.
- The module should be treated as a workbook in which you are expected to write notes and responses.
- The student will be advised of the number of assignments per module.

Approaching the module

- During the course of study, it is useful to contact other learners who will be doing the same course.
- It is advisable to organize group sessions, where learners interact with colleagues doing the same course.
- At some appointed venue, learners will meet a tutor. He/she is a specialist in the subject, and will facilitate learning within a specified number of hours.
- He/she will guide learners to ensure that by the end of the course they can perform the key skills independently.
- The tutor's role is to facilitate learning, not to lecture or transmit information. It is the learner who is at the centre of learning, and is expected to do the following:

- ✓ Read the topics for the next tutorial in advance.
- ✓ Note down the questions to be raised for discussion at the next tutorial.
- ✓ Be prepared to give own views about issues arising from the tutorial.
- ✓ Listen to other students' views and make notes as appropriate.
- ✓ Seek clarification whenever the learner does not understand somebody's viewpoint.
- Set aside specific times for individual study during the week. Research shows that learners who study systematically score higher in assignments and examinations. Such learners also contribute actively during tutorials.
- Make it a point to attend the timetabled tutorials. This is the only opportunity to meet peers doing the same course, as well as the tutor who will give guidance where you experience difficulties.

Reading, listening, writing and speaking are important aspects in the communication process.

Reading in ODL

Reading is interacting with the text. Distance learners read modules, textbooks and also read from the internet. There are various skills that you have to employ, such as:

a) Scanning: This is when one reads for specific information.

b) Skimming: This is when one reads to get the gist /overview of the information.

c) SQ3R: This is **surveying** the text. As one surveys the text, one also applies skimming. This is because it is important to get the general overview of the text. In an endeavor to receive the information in its completeness, one will ask oneself some **questions**. Then there is **reading** of the text. After reading the text one will **recall** what was being read. The reader also finds out if the questions raised earlier are being answered. If there is failure of recalling, then there would be reference the text previously read. Finally the reader can **recite** what he/she has read. This is because the information is in the readers' memory. The SQ3R is an important skill as which also encompasses scanning and skimming.

Listening in ODL

The distance learner has to listen attentively to his/her lectures or tutorials. This is because tutorials come at intervals, that is, they are not regular. Tutors meet learners for a limited time. Most of the time the distance learner is alone meaning the lecturer or tutor is not easy to reach or have regular contact with. As a result it is important not to be passive. In passive listening one listens but nothing registers in his or her memory. Therefore, active listening has to be employed otherwise communication will not have taken place. The distance learner should close out other things like distractions

Writing in ODL

When writing as distance learners, formal language must be used. In writing, there are some conventions to follow. This is characterized by simple language. There will be no point communicating to your audience, for example, your tutor, in a language that he/she will not understand. The use of jargon, slang, colloquialisms and archaic concepts, short message service (SMS) are discouraged. The main purpose of one communicating is to convey the message rather than to impress people with rhetoric. When writing, there should also be use of full / complete words rather than abbreviating or using contractions. Though the audience might understand all these, the bottom line is that the writing is informal.

There should be a good flow of points; hence coherence and cohesion within a text are very important. There should also be an outline made before one can develop the information. The outline is like the skeleton and in developing the text one puts the flesh to the skeleton.

Another important aspect in writing as distance learners is to edit and proof read one's work. There is also the use of appropriate style. Voice is important in writing. When one writes, there should be evidence that the work belongs to the writer. One's voice should be depicted from the piece of writing. It will be boring and unscholarly just to reproduce what other scholars have written, hence plagiarism. Plagiarism is an

academic offence. The distance learner should show that he/she is not an empty vessel.

Writing is a complex process BUT an exciting one. Distance learners write assignments, tests, and examinations, and assessment is largely based on these.

Speaking in ODL

It is important to be a good speaker and have good interpersonal skills.

Interpersonal skills refer to the interaction with others either as a pair or in a group. This is the most important skill that learners engage in.

Intrapersonal skills are part of speaking. This is where one communicates with oneself. This commonly happens when the distance learner engages in dialogue with the self when reading study materials. It is important as it helps one to make decisions.

- ?? a. Which of the four communication skills discussed above do you think many ODL learners have problems with?
- b. How best can tutors counsel learners to ensure they perform better in that skill?

Communication using equipment

There are various ways of communicating using equipment in ODL.

Phone (Mobile or landline): Distance learners can communicate with their tutors, coordinators or other students over the phone. It is important to show courtesy during this communication process. Further, one has to be concise as money is being used to make phone calls.

Skype: With technology advancing, the skype is also used to communicate. In using the skype, one (both the sender and transmitter) has to have the computer, ear/headphones and the internet. If both parties are connected to skype the communication can be longer than when using the phone as this is a free service.

Computer Mediated Communication: One can use the internet to communicate with the other party. There are various ways of communicating, such as:

- a) The electronic mail (e-mail). This is a way of sending messages. One should have a computer, internet connection and an e-mail address. This is the fastest way of sending messages through a computer. There are internet providers that one can subscribe to. Further, one has to have connection to the address and the following are examples: gmail, yahoo, gov., hotmail etc.
- b) The face book. This is a social network, which one can connect to. It works like a family through the use of the computer and the mobile phone.

In all the above means of communication, netiquette has to be exercised. Netiquette is the courtesy that one has to exercise when communicating through the computer.

Topic activities

In every topic within a given module, you will find activities that are aimed at encouraging active participation. The purpose is to encourage interactivity in a situation where the distance education student does not have the privilege of having in front of him/her a teacher on a regular basis. The following points should be borne in mind when you work on the activities.

- Activities are not tests.
- Activities are meant to encourage a deeper understanding of ideas.
- Answers could be written in the provided space.
- The activity should be done before turning to the feedback
- The learner is expected to discuss answers with colleagues and tutors.
- Responses given in the feedback section are not prescriptive, that is, they are not the only answers. There could be alternative responses from you and from members of the group.

References

There are times when you will use information and ideas that are not your own. This is called 'referencing'. The sources from which we get information (textbooks, the internet, journals, etc.) are termed 'references'. At the end of the assignment, the learner should write a reference list of all the sources consulted. Failure to acknowledge ideas that are not your own is referred to as plagiarism, which is synonymous with stealing. In academic practice, this attracts punishment in various ways. Supporting what you write with reference to authorities on the subject is important because it enriches the quality of your assignment by lending weight to the argument. Let us now turn to another important area, namely, how learners should be guided to organize their study. In what follows, read the ideas as if you were a distance learner.

Organising the studies

As a learner in higher education you are expected to master some fairly complex material. Most of us find it hard to learn complex, abstract and unfamiliar content, but find it easier to understand information when it relates directly to needs and personal experiences. Further, the knowledge we learn at degree or diploma level is often specialized. Consequently, a central problem in higher education is how to internalize academic knowledge – that is connect up the new material with things that we already know, and understand how to use such material for our own purposes.

For you to be able to cope with the situation described above, you need some guidance to ensure that the way you study your chosen courses is not a hit or miss affair. There are numerous approaches and techniques associated with more effective study, and these will be discussed later. To begin with let us examine self-awareness, that is, the extent to which you know your strengths and weaknesses when it comes to studying. This is closely linked with the sort of goals you set yourself when you undertake studies.

Setting goals and priorities

What goals did you set for yourself when you embarked on the diploma or degree studies? It is extremely important to have clear goals at three levels, namely:

- short-term,
- medium-term, and
- long-term goals.

It is on the basis of clear goals that studying becomes more realistic and more purposeful. Now, work on the following activities.

Step 1

Examine the courses you have to study, and under the headings below, list your goals.

Short term goals (by the end of the studies)	Medium term goals (in 5 years' time)	Long term goals (in ten years' time)

Step 2

Now, under each heading, write down what you think you have to do to achieve the goals.

Your short term goals	Your medium term goals	Your long term goals

Step 3

Under each heading, write one major obstacle you see as preventing you from achieving the goals.

Your short term goals	Your medium term goals	Your long tem goals

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Step 4

Now, write as many solutions as possible for overcoming each obstacle you raised above.

Your short term goal	Your medium term goal	Your long term goal

After completing the activity, you should have a better understanding of:

- yourself as a student;
- your hopes and dreams;
- possible obstacles that prevent realization of goals; and
- ways in which to overcome the obstacles.

When you have established the sense of self-awareness, the next important thing is time management. To what extent are you able to manage time?

Time Management

Time issues are important, and the attitude you have towards time is influenced by a number of factors from the environment in which you grew up. These factors include our parents, peer group, and the community where we spend most of our time. When I grew up in the rural village, people were very laid back, and there were no deadlines to worry about. There was no problem procrastinating, and there was no hurry. On the other hand, when I enrolled for my studies with the University of South Africa, there was so much pressure that although I was staying in a rural environment, I could not afford to miss assignment deadlines otherwise that meant having an entire course cancelled and I could not sit the final examination. With this in mind, you need to look at your attitude towards time. What influences and continues to influence your attitude towards time? Also, you need to evaluate your habits and make adjustments in order to be successful in your studies. It is possible to spend a lot of time on a task and still fail. The explanation is very simple. One learner can spend five hours studying while at the same time watching TV, while another learner spends two hours in a quiet place concentrating on the same studies. Who of these two is likely to perform better?

This is a common problem I have observed among distance education learners over the years. What you have to learn to do is to distinguish between quantity and quality time you give to any task. You also need to develop the sense of allocating time appropriately. This will depend on:

- the marks allocated to the task;
- your daily schedule;
- the complexity of the task;
- How skilled you are at accessing information accurately and speedily; and



You should draw up your timetable bearing in mind the number of courses or modules you have to complete within a given semester or calendar year. To make good use of the timetable, bear the following in mind:

- clarify your priorities for the day;
- group together those activities that are related;
- divide tasks into workable steps;
- stick to the timetable;
- focus on one thing at a time;
- finish a given task fully; and
- be motivated.

Let's spend some time on the last mentioned point, namely, being motivated. What does being motivated mean?

Are you motivated to study?

Motivation refers to the willingness to do or engage in something. For example, a person is motivated to dance because he/she enjoys the tune being played. Normally there are two types of motivation. The first one comes from outside e.g. a large amount of money for doing difficult work, which we are not interested in. Money, the outside motivating factor in this case, is known as **extrinsic** motivation. The second one comes from within yourself e.g. when you do a difficult or a dirty job simply because you enjoy doing it, and there may be little or no payment. Doing something because you have an interest in it or because you enjoy it, the inside motivating factor in this case, is known as **intrinsic** motivation.

Similarly, when you enrolled for your present studies there must have been certain things that motivated you, some of them intrinsic and others extrinsic. Now share with colleagues some of the things that motivated or continue to motivate you.

Extrinsic motivators	Intrinsic motivators
1.	1.
2.	2.
3.	3.

4.	4.
5.	5.

Extrinsic motivators might include prospects of getting a job, if you are unemployed; promotion, if you are already employed; or the respect you will earn from the community. On the other hand, intrinsic motivators might include the desire for a higher qualification, no matter how challenging; personal pride and the belief that you are intelligent; the feeling that you are different from so and so and the knowledge that you can do it no matter how long it will take you.

It is important to note that both extrinsic and intrinsic motivation, complement each other, but intrinsic motivation is the more important of the two. Remember the saying: “you can take a horse to the river, but you cannot force it to drink”. This means if you do not have intrinsic motivation to do your studies, no amount of extrinsic persuasion or the promise of a huge salary can on its own work out miracles. The following are some of the strategies to help you improve motivation for your studies, especially whenever you feel that the work is too difficult or too much.

- Imagine yourself succeeding, passing your examination, and getting congratulated by family and friends.
- Think of the pride you will feel when you can add letters of the qualification you have obtained after your name e.g. Kago Bome (B.A.).
- Find a space at home or at work where you can study without disturbances.
- Draw up a timetable, and follow it strictly.

Make any other suggestions on how best to motivate yourself. When you have familiarized yourself with what it takes to be motivated, the next step is to study. Fortunately, the print material prepared for distance education learners is written with the idea of motivation in mind. The material is in itself motivating.

How the material is presented

To motivate the learner, distance-learning materials are organized in the manner described below:

- Each module has an overview, which indicates content areas covered, and assessment procedures.
- There is a selection of measurable objectives at the beginning of each topic.
- A summary or conclusion is provided at the end of each topic.
- Regular headings and sub-headings are provided to serve as signposts of chunks of knowledge.
- Activities and in-text questions are provided at intervals so as to encourage you to reflect on what you read previously, or to prepare you for what follows.
- Feedback is provided after an activity to help you formulate your own responses.
- Whenever possible, examples from life situations are provided to enable you to link new knowledge with practical examples.
- Bullet points are used to back up the headings and to make the text readable.
- Keywords are highlighted or defined to encourage easy access to knowledge.
- The content is written in personalized style aimed at making learning more enjoyable.

As you engage more deeply with your studies, keep these points in mind:

- Make knowledge your own by relating it directly to your needs and experiences.
- Remember that knowledge taught in higher education is often specialized and abstract.
- Regular assignment writing is vital because it forces you to select what you find plausible or interesting in books, journals, and the internet. It makes you express your understanding in a coherent form.
- Participation in face-to-face tutorials helps you to internalize academic knowledge in context when you talk about areas of mutual concern with other learners.
- Acquire a dictionary for regular consultation of the spelling, meaning, and pronunciation of words.
- Understand the requirements for your diploma or degree programme by referring to the Regulations and the syllabus.
- Read the history of a given subject, which describes the controversies that have shaped its evolution.
- Keep your study methods under review. Remember that those study methods you used at an earlier stage in your education career may achieve very little when studying for a degree or diploma.
- Talk through study problems by discussing with fellow students and tutors.
- Avoid plagiarism, that is, acknowledge authors of those ideas you borrow to strengthen what you write.

Challenges

The foregoing discussion has been brought about by the situation on the ground that impelled the authors to strive for awareness creation. There are challenges among students that are identified on a day-to-day interaction.

- One of the major communication challenges is a serious deficiency in the use of the language of learning. When studying a particular discipline, language skills are brought into play, and these include the use of general language patterns and language specific to a particular course. This is referred to as ‘discourse’. Learners are advised to make the necessary effort to master it.
- There are times when there is severe communication breakdown, especially in written communication. Issues of ambiguity, poor punctuation, inability to handle an argument, poor referencing skills, misconceptions, and several other communication problems often prevail.
- Learners often experience challenges with timetabling and prioritizing their activities as distance learners. More often, the challenge has to do with reconciling the other responsibilities (social, work-related, and personal) with studies on hand. This can be construed as the inability to manage one’s time.
- It has often been observed by tutors that learners are wanting in study skills. There are ways (such as those discussed severally above) of ensuring that when one embarks on studies one has to consciously learn the tips and techniques needed to make the study effort a success.

- Outside face-to-face tutorials, it has been noted that not many learners develop the habit of forming study groups with peers. This is an important communication skill that enhances personal perceptions about knowledge encountered in study modules.
- There seems to be a major challenge with reading habits. The authors have observed that some students lack familiarity with the module that forms the basis of any given course, in the first instance. Beyond reading the module, and more importantly, there are many learners who do not read additional books as a way of enhancing their performance. This results in mediocre or below par performance. The need to cultivate a culture of reading can, therefore, not be overemphasized.

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Chapter 7

Editing Open and Distance Learning (ODL) Study Materials

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Some Questions

1. What is involved in the editing process?
2. What types of editing are practised?
3. Can pictures and or diagrams be edited?
4. Why is it important to follow a publisher's format and house style in editing?
5. How does the editing process ensure adherence to instructional design principles?
6. How can the process of editing enhance the learner's access to the material?
7. What sensitivities are there in editing?
8. In what ways can an editor play an important role in ensuring that ODL materials are not subject to plagiarism?
9. How can you ensure that open educational resources materials are suited to the purposes of your own programme?
10. While use of technology in editing is encouraged, what are the important steps to take to ensure that the editing process is useful?

Introduction

In open and distance learning (ODL), the learner is separated by distance, time and space from the tutor. Perraton in Nom AMBE-UVA (2006) asserts that in ODL, 'a significant proportion of the teaching is conducted by 'someone' removed in space and time from the learner and that the link between that 'someone' and the learner is therefore necessarily provided by different means of communication and instruction' (2006:3). The print medium is one such means, and is presented in the form of study modules. Considering geographical apartness, and particularly that the learner is isolated, the materials must be comprehensive, readable and self- instructional to afford the learner the opportunity to access content as intended.

Now, how do we ensure that the materials meet this required standard? The answer is to quality assure materials by editing them for several aspects including: content, structure, language, media relevance, presentation, general appearance, as well as overall compliance to the institutional house-style. Then, what is editing? In this chapter, we shall attempt to define the term, *editing* as it relates to distance learning materials to make them user-friendly and accessible to the learner. Related examples will be used to elaborate on the processes of editing instructional materials.

Definition

I believe you have heard and used the word, *editing* several times. How would you define it? Work on this activity before reading on.

?? My definition of *editing* is

You may now read on and check to what extent what you have said is in agreement with what follows.

The term editing involves making written text fit for production. It is a process of looking into and thoroughly correcting the written/ print materials so that they become suitable for publication (IGNOU, module 3, ES-312:25). The process of editing in distance education varies, it can be done by the course coordinator, or the editor-in-chief of the institution, or some other professional within the writing team. It is a massive exercise and needs someone not just knowledgeable about the content but also about the quality of didactic writing aimed at the distance learner. The editor in distance education has multiple roles, which include ensuring that:

- the lesson objectives are clearly stated,
- the content is relevant,
- the language used is appropriate for the target learners, and
- ideas are well presented to enhance linkages between units, lessons and sections.

In that respect, editing is categorized into these aspects: content editing, language editing, copyediting and proofreading. The latter comes as the last stage before the printing.

?? Briefly explain what you understand by each of the following:

- a. content editing
- b. language editing
- c. copy editing
- d. proofreading

More detailed explanation of each term will be given later. For now, it should be remembered that editing involves technical skills with the objective of ensuring quality production and enhanced presentation of materials for public readership. Editing of open and distance learning materials has two main aspects, namely, the human aspect and the technical aspect. The human aspect relates to good human relations between the editor and the author, who is the originator of the work and the publisher whose corporate identity must be protected from disrepute. We now explain the different categories.

Content editing

In content editing, focus is on the correctness of the study material, and the content editor is, like the author, a content specialist. Content editing involves making sure that the learning materials are educational, conversational, self-pacing and pedagogically sound (Parer cited in Rahman, 2006; Longman, 1999). The materials should be pitched at the appropriate level for the learners. The appropriateness of the level is considered in terms of the level of conceptualisation expected of the learner. If the concepts are higher than the level of understanding of the learner, then there will be a gap in knowledge acquisition. This knowledge gap should be mitigated by bringing in knowledge and skills that will bridge the gap.

The content editor checks for consistency in the structure and design of the learning materials. The design, which entails format, layout, style and extent, should be formally agreed on between the publisher, the author and the designer. The editor's job is to ensure that the author has followed what has been agreed to as set out in the guidelines to manuscript writing. The editor is also responsible for checking out meanings and clarity of concepts to ensure that the learning materials communicate the ideas that they are intended to communicate. It is the editor's prerogative to ask the question: 'Is there a better way of presenting the same content?' or 'Can this component be broken down to two or more parts?'

Content editing checks content against specified objectives of the curriculum. These objectives set the criteria for judging the merit of the materials. In checking the content there is need to reflect on the exercises, questions, and feasibility of an examination to ensure that they are consistent with the objectives of the course. The ODL materials should be evaluated against the syllabus or curriculum to ensure alignment with set levels and approaches that match the operational levels of the targeted audience. (Longman, 1999).

In some cases, a content reviewer who is also a subject expert, fully conversant with the body of knowledge, approaches and target audience, initially does content editing. The content reviewer assesses both consistency, structure and design. He/she checks the usefulness and relevance of the diagrams, pictures and illustrations. The content reviewer may suggest a re-ordering of the sequence in the presentation of materials in accordance with the expectation of the curriculum and syllabus. After the content has been reviewed, the editor still checks for consistency and soundness of the design, structure and level of the ODL study material.

??

- a. What are the essential aspects of content editing?
- b. How does content editing assist the accessibility of ODL materials to the learners?
- c. What do you think are the essential differences between a content editor and a content reviewer?

Copyediting

When the content editing process has been done, the next stage is copyediting. What then is copy editing? Copyediting aims at making the ODL materials perfect in every respect. Organisations adopt and develop different house-styles. The principal focus of copyediting is clarity and consistency in print-based instruction (cf. Thomas, 2005 in UB manual for Writers and Editors). He further divides the functions of copy editing into three categories: proof reading, medium copyediting and heavy copy editing functions.

- a. Proof-reading, also called light editing, involves checking the manuscript for typographical and spelling errors, incorrect word use, inconsistent formats, and font sizes.

- b. Medium copy editing deals with more subtle errors such as use of wrong words in a given context; unity within the different parts and sections of a manuscript; inappropriate language use; bias related to gender, ethnicity, religion or culture;
- c. Heavy copyediting involves the structural and linguistic flow of the manuscript. This is crucial as it makes the text readable and enhances easier accessing of content. For some people, proof reading is synonymous with copyediting. However, the discussion in this section clearly indicates that copyediting is much more demanding as it goes beyond mere proofreading.

Language Editing

The issue of achieving effective communication in ODL materials cannot be over-emphasised. The content might be available but it is how accessible it is to the learner that takes precedence not only in terms of the structure of the content document but, more on the language used to communicate it. Therefore, this section deals with key language aspects and how they must be addressed. The editor here assesses the simplicity and comprehensibility of the words used and makes necessary changes so as to make it easier for the learner to have easy access to the content. In particular, the language editor examines, among others, three aspects.

Readability of a text

Readability refers to the extent to which the language level matches the reading level of the target audience (Nuttall, 1996). The length of sentences, number of syllables in words, use of active/passive voice, and wordiness of text, measure readability. These can make the text inaccessible if not adequately addressed. It is preferable to use short and less complex sentences, simple words but without compromising quality by leaving out technical terms, which must be introduced in context to enable the learners to infer their meaning. Using the passive voice takes the content away from the learner, while the active voice makes the learners part of the text. Hence, it is important to make the texts speak directly to the learner by using personal pronouns: *I, we, you, and us.*

Language register

This refers to the language, terms or vocabulary related to the concepts and topics discussed. Some subjects use technical terms, which if not well presented could cause a communication barrier. It should be borne in mind that it is important that the learners are exposed to the terms. The best way is to introduce them gradually and also use them in a context so that the learners can defer their meaning without necessarily having to consult a dictionary.

Coherence in writing

Different aspects must tie together in a piece of writing. This is even more crucial in ODL self- instructional materials where the learner might have little professional support. This coherence of ideas must be achieved at module level, paragraph level and sentence level.

Sentences must be constructed in such a way as to communicate directly. They must be shorter and simple. When a complex sentence is used, it must be for a purpose, without compromising understanding of concepts.

Ideas should be presented gradually, logically and developmentally such that each idea is expanded within one paragraph. Many ideas packed in one paragraph can confuse the reader.

?? What distinguishes the copy editor from the language editor?

Practitioners often have difficulties making a clear distinction between the two concepts. However, closer reading reveals that there are distinctions, though there are also some overlaps.

What distinguishes the ODL editor from other editors?

Editors of DE study materials have roles that differ from editors of newspapers or editors of academic textbooks commonly found in publishing companies. The editor of a newspaper, or magazine, for example, does not brief reporters or writers on what to write and how to write it. But since the editors' profession allows them to do whatever they can with the piece of article in-front of them, they can cut writers' texts to any size and change it to suit their purpose without consulting the writers or wait for their permission (IGNOU, 312 block 3:2006). On the other hand the editor of a publishing house might reject the author's material or accept it with some or no changes. Consequently s/he might delay its publication for editorial reasons. The film editor does the same thing.

The editorial job in distance education is ongoing. In this case the editor is expected to work long hours, for many days/months. The editor is on and off, having to tackle many courses or programmes. Having so many courses to edit, editors in distance education should have certain distinguishing characteristics, such as:

- possession of distance education skills;
- knowledge of the distance education learner for whom the material is written;
- putting himself/herself in the place of learners.
- exercise some patience in playing the role of an intermediary between the course writers and production team members;
- give feedback to writers;
- report on progress to the team members;
- clarify to everybody what is needed and when that is needed;
- sort out problems when schedules go wrong; and
- keep records of progress in material production.

It can, therefore, be concluded that editing ODL self-instructional materials is a necessary quality assurance process without which parity of standards may be compromised.

?? To what extent do you think editorial work in distance education is more demanding than editing for commercial purposes?

There is no right or wrong answer to this question. You are expected, as a practitioner, to go over the characteristics cited above in order to make an informed judgment.

Making the writer more accessible to learner characteristics

Rahman (2006) points out that Distance learning courses are organized as a number of linked but discrete modules. Modules are commonly referred to as being self-sufficient study materials.

The critical role in editing ODL materials is therefore, making them more accessible to the learners. In order to achieve this goal the editor has to look at the materials as if he/she were a student. When you put yourself in the framework of the learner, there are a number of questions you may ask such as:

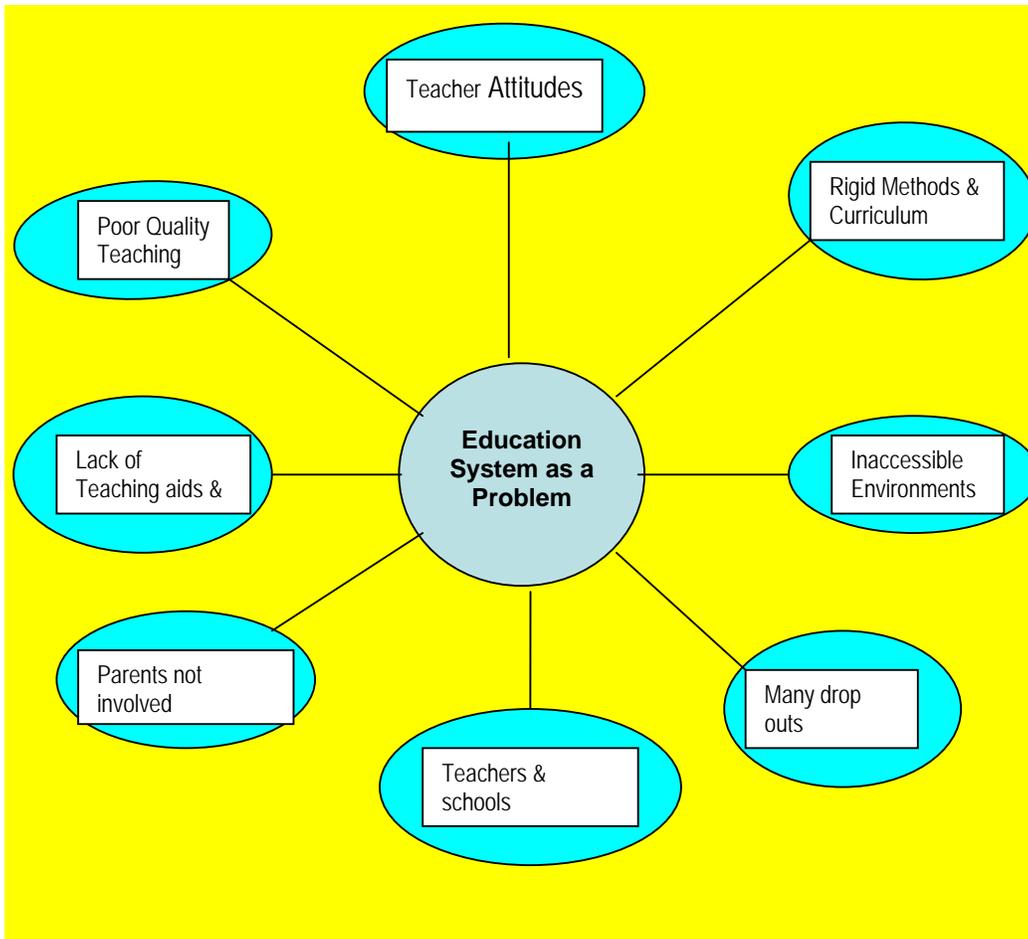
- Does this information make sense?
 - Is there a pattern to follow?
 - Is there a missing link?
 - What other resources can augment the given materials?
- (cf. Commonwealth of Learning, 2010).

If the materials are not readily understood from this perspective then they are no good for the ODL learner. Bramawong (cited in Rahman, 2006) points out that a distance learning (DL) text is designed and written in a modular-format to help home-based students to learn effectively. The editor's task is, therefore, to make suggestions in consultation with the author, in order to make the materials interactive and easy to read for the ODL learner. There are a number of strategies, which an editor should recommend to get ODL materials to a level where they are readily understood by the learner.

- One way is to ensure that the material engages the learner through regular questions and exercises.
- Another way is to ensure that the material addresses the learners and speaks to them.
- One of the key principles is that the material should essentially motivate the learner to take ownership of the learning process.

Editing pictures, diagrams and illustrations

Pictures, diagrams and illustration form an integral part of the learning materials. They have the capacity to convey more ideas in a vivid way than the text. They also take less paper space than text. Pictures, diagrams, and illustration require editing just like text to ensure clarity and consistency in conveying the same ideas it purports to communicate. For example, the diagram below, illustrates well, the perception of the education system as a problem when considering inclusive education. It could have been more difficult to cover the same material in text and get the same clarity and visual motivation that the diagram brings.



Rieser (2008: 28) *Implementing Inclusive Education : A Commonwealth Guide*

The diagram shows attitudes consistent with the perceptions of an education system as an impediment to inclusive education, and summarises what could have been written in ten or even more pages.

?? Why do you think it is necessary to edit pictures and diagrams in DE study materials?

This is a very important question for the ODL practitioner to answer, mainly because unedited pictures may convey the wrong information.

Taking care of gender bias, racial bias and other sensitivities

Are gender, race and culture issues of concern to the editor? Of course, these are topical issues, which need to be accommodated in the style and standard of writing. For instance, to portray women in subservient roles is no longer acceptable neither is the opposite acceptable. Despite affirmative action, it is somewhat smart to play gender neutrality in writing ODL materials. Gender neutrality refers to the use of both male and female pronouns in every situation as a standard way of presenting textual information. For example when we say, *he/she can be affected by drug addiction*, we are saying both male and female can be addicted to drugs. This is the way to write

ODL materials without gender bias. Racial bias is manifested when one race is portrayed as superior to the other. Nowadays, schools have a tendency to be multicultural with learners from more than one ethnic group. Also ODL students come from a variety of backgrounds, races and cultures. It is therefore important for the editor to ensure that authors of ODL materials present work that is free of racial and cultural bias. Racially and culturally, offensive learner materials are received differently by different learners and they cause unnecessary disparity among learners. ODL materials should foster non-racial and culturally inclusive attitudes and behaviours. Even in giving examples, we need to balance them on the gender and racial divide so that there is no overrepresentation of one group at the expense of the other.

Also, there are other sensitivities such as political, religious and or national that may cause dissatisfaction among learners. These should be avoided wherever possible so that all learners respond favourably to the ODL materials.

??

- a. Discuss gender bias in educational materials. What is its effect?
- b. Why should racial bias in educational materials be avoided?
- c. How is this done?

In situ editing

In situ editing relates to editing especially of educational resources that are posted on various websites by many educational institutions. *In situ editing* therefore implies editing that is situational and designed to recast or repurpose the learning material provided, to suit the needs of the new audience. For example, an editor may choose to edit educational material meant for the developed world to suit the needs of the developing world. This editing is technically meant to recast the material for the needs of the new consumers. In ODL, *in situ editing* is very appropriate and may increase the sharing and integration of knowledge on a regional or continental basis.

Recasting or repurposing educational materials implies that you are making them accessible to your audience, with relevant and contextualised information that suits their needs. In recasting or repurposing open educational resources (OER) you could delete part of the content and add new sections, illustrations and/or visual images.

It is important to note that there is no limitation on the amount of changes you can make. The choice is yours depending on your need. However, it is important to take note of the following issues:

- why you are repurposing the content;
- who your audience is;
- why you think this audience would use this material;
- the learning outcomes of the material;

- anticipated repurpose time.

(<http://openlearn.open.ac.uk/mod/oucontent/view.php?id>)

When carrying out *in situ* editing we should always be guided by the objectives of our programme and not the content on the web. *In situ* editing and repurposing OER materials increases our access to educational material for the benefit of the ODL students.

?? a. What are the advantages of accessing open educational resources?
b. What are the precautions you should take before using these resources as they are?

Using technology in editing

With the advent of the digital technology, editing ODL materials has actually moved into the e-edit mode. Browel (1996: 9) has also noted that:

as one of a number of new learning technologies, multimedia is increasingly being used in traditional training and development events and also in open and flexible learning modules.

It is important at the onset to give you a comprehensive definition of multimedia. Dahmer (cited in Browell, 1996) defines multimedia as:

Something that combines the capabilities of technologies that used to be separate ... it can combine things like text, graphics, sounds and still or motion pictures in a smooth way to present training or information; and print, telecommunications, video and broadcasting, and computers have merged – and the result is what we now call multimedia.

A number of research studies have found that multimedia has a number of advantages in teaching and training (Laurillard, Garai and Graham cited in Browell, 1996:10). Some of the advantages include motivation and capacity to enrich the learning experience; and the capacity to support the learning process and increasing the learners' capacity toward autonomous control of the learning process.

Multimedia itself, because of its nature, will require editing by digital technology. What is important is that, any image that sends out information should be edited in the same way we do content and copy editing. The difference may only be in the tools used. The aims and objectives of the learning process remain the same, thus, editing should take place to ensure that learning and not entertainment takes place. However, there are a number of considerations that must be taken before wholesale use of multimedia in ODL instructional delivery. These are as suggested by The National Council for Educational Technology,

- carefully identify curricular needs and priorities;
- examine available materials;

- calculate the cost of hardware, software, disks and other resources;
- estimate costs in staff time for developing materials and staff development in use of multimedia
- will students gain new skills, knowledge and/or experience from these materials?
- is the multimedia material educationally valid and are the style and content compatible with students needs, interests and abilities?
- does the multimedia material aid concept formation, reinforce skills and facilitate assessment?
- does new technology demand changes in current teaching and learning styles and what support will students need from lecturers/trainers?
- are the staff committed to the use of multimedia and determined to make it work ?
- how can staff be motivated to take ownership of the multimedia initiative?
(Browell, 1996: 10)

From the above considerations we can see that a lot of editorial decisions need to take place before multimedia can impact the instructional delivery in ODL materials. The editor needs to be conversant with the requirements of the curriculum in order to assess the utility of the multimedia as well as edit out information that interferes with the learning process. Also, we need to point out that there is editing software in information computer technology usage that will make the editing process faster and efficient. Editors would therefore need training in order to effectively use e-edit tools appropriately.

??

What is the impact of digital technology on the process of editing?

Communication with authors

The editor in his/her work communicates with the author, the reviewer and the publisher to ensure that the ODL material is consistent and learner friendly. In communicating with the author the editor would want to appreciate certain unclear or ambiguous aspects in the material so that they become explicit for the reader. The editor may even suggest to the author ways to revise the material and to make it more interactive, conversant and consistent with the requirements of the course and the learners. Communication with authors is sometimes not so easy especially when you have to meet the expectations of the publisher. Sometimes the editor may find it easy not to confront the author but to point out errors including the dots on the *i*' and appropriate punctuation on the manuscript and submit a comprehensive report with both suggestions and recommendations. Onwuegbuzie and Daniel (2005:7) point out that even in research articles authors present work fraught with seven types of errors which are:

- Introductory errors
- Literature review errors
- Procedure errors
- Pre-analysis errors
- Inferential based errors and
- Overall writing errors

These seven types of errors beg such questions as; Does the paper have an introduction? Literature review even in modules usually remains undeveloped and let alone hanging from nowhere. In terms of ODL material pre-analysis errors would relate to gaps in information or redundancy of the same information. Also we need to ask ourselves what the information in our modules infers. Overall writing errors would relate to grammar, citation, style, referencing and structure. These errors devalue the manuscript.

The editor plays an important role in quality assuring the ODL material at the design stage. In this regard the role of the editor is quite indispensable. He/she is an integral member of the course team for the production of learning materials in ODL. He/ she should be a good communicator in order to establish a collaborative atmosphere between himself/herself with the authors and publishers. The editor's office is there to protect professionalism and the interests of the intended audience of the learning materials.

House Style issues

Different publishers have different house styles for their publication. The house style is usually specified in the call for writers and may be in the form of a guide. What constitutes a house style are all aspects of presentation of the ODL material such as the following:

- Linguistic Styles
- Font, pagination
- Page layout (margins and indentation)
- Referencing style
- In-text referencing and reference section.

There are a number of conventions in writing up manuscripts but each publisher insists on a certain style of presentation. The author must therefore adhere to that style as a standard. ODL materials are usually in modular format but the writing style is set out by the sponsoring institution so that learning material maintains a certain standard of presentation.

Rahman (2006) suggests that there is need for a guide, which specifies styles used in referencing, spelling, abbreviation, punctuation, quotation and citation. A standard publication guide should also be made available to all writers/editors that specifies page size, layout, fonts, graphic, colour and other related matters

Plagiarism

One of the most difficult issues in editing academic work is plagiarism. Plagiarism is an academic offense relating to theft of academic property. Plagiarism takes place when you take someone's work as your own. The definition of plagiarism is:

“Using someone else's ideas or phrasing and representing those ideas or phrasing as our own, either on purpose or through carelessness”

(<http://www.123helpme.com/view.asp?id=28208>)

In academic writing such as in developing ODL materials, we should always remember to acknowledge in-text work that belongs to other authors. Editors have an unenviable role of judging whether the work without any quotation marks or citation belongs to the current author. Plagiarism is therefore an unethical practice for which one can be sued. It is critical that authors are encouraged not to plagiarise in order to avoid embarrassment. Because the practice has been rampant in educational materials, a number of strategies have been developed to help editors detect and prevent plagiarism (Sobhan, 2006). One way is to use electronic tools designed to detect plagiarism in a sample of some work. Another option is to improve learning and teaching of ethics so that scholars remain ethical and above reproach in matters of this type of academic offence. The third strategy to reduce and or eliminate plagiarism is to penalise those responsible for committing the act. The fourth strategy involves litigation based on the copyright act and the cyber law and other instruments. There are some web-based ways of detecting plagiarism. For instance you can submit a copy of the suspected work to any one of the following websites:

- Plagiarism.com- www.plagiarism.com
 - Plagiarism.org-www.plagiarism.org
 - Wordcheck-www.wordchecksyste.ms.com
 - Integriguard-www.integriguard.com
 - Eve- www.canexus.com/eve/index.shtm
- <http://www.123helpme.com/view.asp?id=28208>

When a portion or the whole paper has been submitted to any of these websites, the results will show which parts have been copied without due acknowledgement. Also any editor can pick plagiarism by taking note of unusually well written passages and also, any inconsistencies in the presentation.

When editing ODL materials, it is important to always look out for cases of plagiarism to avoid unnecessary embarrassment and delays in getting the work to the consumer. The authors should be warned that ODL students themselves can easily identify where the author has plagiarised. They may come across the article or book from which the text was unlawfully taken. In this situation the author will already start to lose value in the face of his/her students. It is therefore critical that the editor detects this heinous crime before it gets to the audience.

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How can plagiarism be detected at the editing stage of ODL materials development?

Challenges

The challenges faced in the editing of ODL materials are numerous, and include the following:

- Generally, there are no trained editors in the majority of ODL institutions. In the majority of cases, people are appointed to learn editorial skills on-the-job.
- Some institutions do not think editorial service is essential.
- Writers of study materials have been known to resist or even resent suggestions made by editors.
- It is common experience among institutions that after receiving editorial comments, many writers get discouraged. Some of these actually give up the writing, resulting in failure to meet deadlines.

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CHAPTER 8

Gender Perspectives in ODL

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Some Questions

1. What is the connection between knowledge about gender and ODL practice?
2. What is gender?
3. What is the difference between gender and sex?
4. What are gender stereotypes in education?
5. How can ODL affect the lives of women learners positively in the SADC Region?
6. What is the background to the provision of ODL to women in the sub-region?
7. What strategies can be used to enhance participation by women in ODL?
8. Why is participation in ODL (by women) low?
9. What are the benefits to women of studying through ODL?
10. What challenges are faced in the provision of distance education relative to gender?

Introduction

The issue of gender has taken centre stage in the fields of social, economic and political endeavour. The same applies to education where concern about the education of the girl child has become topical. This is against the background of traditional African education coming in confluence with Western education. The latter has been in operation since the colonial days and is commonly referred to as 'conventional education'. In recent years, ODL has become widely acknowledged as an alternative to conventional education. There are issues that this alternative mode seeks to address, and these include the democratisation of education; opening up access for all; reduction of poverty; and creation of employment. In the endeavour, it seems the welfare of women has not been accommodated with the same degree of seriousness accorded to that of the male counterpart. The present chapter, therefore, seeks to guide the practitioner in distance education praxis to appreciate and develop the much-needed awareness about gender and education. Experiences from two SADC countries (Botswana and Zimbabwe) are presented with the view to shedding light on perceptions and insights about gender. We, the writers, argue that these experiences are likely to mirror social situations in the other countries of our region. Exposure to the two scenarios, it is presumed, will serve as practical direction for more meaningful distance education practices since there are commonalities in the dynamics of social progression among the countries.

Key terms

Gender: Refers to the attributes, roles, expectations, restrictions, etc. that a society associates with men and women, and is basically the sum of cultural values, attitudes, role, practices and characteristics based on sex (Gender in Everyday Life, 2009).

Sex: In the context to which it has been used in this chapter, sex refers to the physical classification based on reproductive organs. The main difference between gender and sex therefore, is that sex is **biologically determined** while gender is **determined by the society** one lives in, and can vary from society to society.

Stereotype: These are ideas and attitudes that a group of people holds about themselves or about other people. Stereotypes focus on real or imagined traits / behaviours. (Gender in Everyday Life, 2009).

The Botswana background

Missionaries pioneered the work of educating the masses in the first half of the 19th century (Mphinyane, 1999). Like in other countries, the colonial government did not see why they should educate Batswana then and, as such, education was seen as a responsibility of the "Men of God". The missionaries had to educate people as they needed some translators who would assist in their mission, namely, to save souls for Christ. It is important, however, to note that ODL was never an option for the missionaries. It should also be noted that amongst the Africans, Batswana included, distance learning has always been there. This was evidenced by communicating using drums and fire smoke with people who lived far from where the rest were.

Although modern distance education has a very long history in other countries in the region like South Africa and Zimbabwe, formerly Southern Rhodesia, it started very recently in Botswana. The earliest distance education activity in the country was started in 1962 when the Central African Correspondence College (PVT) Ltd based in Salisbury, present day Harare, Southern Rhodesia, caught the attention of the protectorate's education authorities. By the end of 1962 teachers in the protectorate had started receiving nominations and notifications for the in-service training course for elementary teachers certificate. This was the beginning of the long journey that came to be the present day Open and Distance Learning. There was some kind of learner support system in place for these teachers as there was a vacation course arranged for aspects that were not covered by correspondence. In addition to this there were also some special broadcasts during weekends when teachers could listen to radio programmes.

Even though colonial authorities observed in various reports that most Batswana started primary education between the ages of 13 and 17, there was no move taken to start distance learning programmes in the protectorate earlier until 1963. Shortage of funds and manpower also prevented the adoption of any comprehensive scheme on adult education. However, distance education gained more prominence in 1968 when the Francistown Teacher Training College became engaged in a project of upgrading primary school teachers using distance-teaching methodology (Mokaeya-Nage, 1992).

The government of Botswana has always shown great interest in Open and Distance Learning even during the pre-independence years. In the early 1960's many primary schools in the then British Bechuanaland Protectorate were trained through what was

known as the Bechuanaland Extension College, later to be re-named Botswana Extension College, which offered courses through correspondence. Since then Botswana never looked back in her provision of education through the distance mode. Dire need was felt across all levels of educational opportunities, that is, primary, secondary and tertiary education.

In 1977 the National Commission on Education reviewed the situation on the ground and recommended that there be provisions in place to develop education both in formal and non-formal set ups. This gave birth to the Department of Non Formal Education (DNFE), which was established in the Ministry of Education in 1978. DNFE then absorbed the Botswana Extension College, which then started operating as the Distance Education Division (DED) of the DNFE.

With the passing of time it was evident that ODL was becoming an attractive educational alternative with the government of Botswana. The University of Botswana started operating its distance education wing, the Centre for Continuing Education (CCE). Yet another National Commission on education (the Revised National Policy on Education, 1993) proposed the formation of a semi autonomous and non-profit making college of distance and open learning. This proposal was endorsed by the government's White Paper in 1994. All these developments gave birth to the Botswana College of Distance and Open Learning (BOCODOL), which was established by legislation in December 1998 to enable provision of quality Distance and Open Learning.

?? On the basis of the Botswana scenario:
i. briefly summarise the history of ODL in your country?
ii. What similarities can you identify between the historical background in Botswana and those of your country?
iii. What in your opinion is the significance of the historical background in the discussion of gender and ODL?

You will probably note that any discussion about gender and education is rendered meaningless if discussed in a vacuum. Obviously, the role of missionaries is a commonly shared experience in our countries. Then when it comes to the fuller discussion of gender proper, we will be drawing insights from the historical background.

The Zimbabwe background

Open and distance learning (ODL) in Zimbabwe has been in existence since 1928 when the oldest of the correspondence colleges, Rapid Results College was founded. It was followed by Central African Correspondence College that was founded in 1954. The year 1980 saw the establishment of the Zimbabwe Distance Education College (ZDECO). The first two correspondence colleges and other less prominent ones offered studies to pupils from Grade 5 up to 'A' Level, while ZDECO offered and still offers secondary and professional studies for middle and senior managers.

In Zimbabwe ODL at University level only became locally available with the establishment of the Centre for Distance Education (CDE) at the University of Zimbabwe in 1993. In 1999 the CDE transformed itself to become Zimbabwe Open

University (ZOU). The second Open University is Women's University in Africa (WUA) that is a private university. Prior to the establishment of ZOU and WUA, the University of South Africa (UNISA) and St Andrews College for distance education provided and still provide tertiary education to Zimbabweans through open and distance learning mode. Of late, the Indira Gandhi National Open University, Derby University in United Kingdom (UK), and many other European institutions that have joined the group of colleges are offering tertiary education through ODL to many Zimbabweans. In addition almost all conventional Zimbabwean Universities are also offering parallel programmes that use the Open Distance learning mode of delivery. However, not much has been researched to establish the level of participation of women in these institutions.

?? Apart from local ODL institutions, Zimbabwe makes use of international ODL providers.

- a. What is the situation like in your country?
- b. To what extent do women access such institutions?

Zimbabwe has a population of about 13.3 million people of which 51% are women (Kaulem, 2007). The rural based population is about 65% and the country's literacy rate is about 91%. The number of people living in poverty was estimated in 2004 to be over 80% of the total population (Central Statistics, 2006). Issues affecting women include poverty, HIV and AIDS, domestic violence, rape, teenage pregnancy, divorce and marriage break up, prostitution, cross border trading and economic hardships being evident in both rural and urban Zimbabwean settings. Within the context of rapid technological change and deteriorating economic conditions, the Zimbabwean education system is challenged with providing increased educational opportunities without increased budgets.

Many conventional higher education institutions, the world over, are answering this challenge by developing parallel programmes that use the delivery mode of open and distance learning. At its most basic level, open and distance learning takes place when a teacher and student(s) are separated by physical distance, and technology (i.e., voice, video, data, and print), often in concert with face-to-face communication, is used to bridge the instructional gap. These types of programmes can provide adults with a second chance at a University education, reach those disadvantaged by limited time, distance or physical disability, and update the knowledge base of workers at their places of employment. Higher education is expected to cater for educating and training high quality human capital with requisite skills to command the premium in the national development agenda. It has been documented that women in Africa have now developed and strengthened skills for lobbying, networking, and organising, articulating and exercising pressure where necessary for improvement (Kethusegile, Kwaramba & Lopi, 2000). A study undertaken in DE in India indicates that the enrolment rate for women is 37.56% (Rathore, 1996). On another note in Germany von Prummer (1993) in a study entitled "Women friendly perspectives in distance education" revealed that women were fewer in open and distance learning universities. However, the level of participation by Zimbabwean women in higher education and in particular ODL has been scarcely documented. In actual fact, this is also the case in the SADC countries.

- ?? a. What efforts are made in your country to improve participation by women in ODL programmes?
- b. What documentation and statistics are available in your country about the level of participation by women?

Why participation in ODL is low in Botswana and Zimbabwe

We presume that whether you live in Tanzania, Mozambique, Angola, or Lesotho, there is compelling evidence that participation by women is generally low. Traditionally, in Zimbabwe boys and girls were treated differently by the socio-cultural and economic system. Traditionally, parents preferred to send a boy child to school over the girl child, despite the essentially equal potential academic abilities. According to a study carried out by Equal Opportunities Commission in the United Kingdom (dealing with the situation of girls in that country), girls were placed disproportionately on clerical, retailing and caring schemes, whilst boys dominated the information technology schemes in spite of the fact that girls were found to be more adept than boys (Webb,1997). Similar trends were observed in Zimbabwe, where more women resorted to such jobs as nursing and teaching, leaving the engineering and technological fields to men.

When tertiary education programmes by ODL were introduced by the University of Zimbabwe's Centre for distance education in 1993, the trend was that there were more male than female students. This trend was similar to what had always been happening at the conventional University of Zimbabwe. Zimbabwe is a patriarchal society and men hold a disproportionate amount of power. It follows then, that in such a society many of the rules, institutions and values of society support the notion of male superiority and reinforce the corresponding subjugation of women (Webb, 1997).

Academic institutions are male dominated to the extent that much of what is studied relates mostly to male activity. Until recently, women were generally viewed as carers with their daily tasks limited to cooking, washing and cleaning. Gender discrepancies are also seen in the field of literature where a woman author had to write books under a pseudonym in order for her to be viewed as a male and receive honour. In the field of nursing, male nurses always struggle to find their way into managerial posts. In the teaching profession, the majority of headmasters are males. In higher and tertiary education institutions, out of the nine universities in Zimbabwe, only two universities are headed by females. In ZOU, out of the ten regional directors and their deputy regional directors, there are only two females holding the post of Regional Director. Whilst all effort is being made to ensure gender equality, there is still a need to re-orient men in Zimbabwe who still believe strongly that women are 'helpers' in society. The Distance Education revolution is viewed as a vehicle that can bring about gender equality through information dissemination, women empowerment as well as policy change through distance education programmes.

?? "The distance education revolution is viewed as a vehicle that can bring about gender equality". By carefully reflecting on this statement:

- a. To what extent has ODL revolutionised the provision of education in your country?
- b. In what ways has the revolution made an impact on access to educational opportunities?

Development and poverty eradication are processes of structural change in the economic, political and cultural domains. These processes start with educating people since it is the primary and ultimate focus for development and poverty eradication. According to Ablodun (2008) there is considerable evidence from South Africa, Ghana, Egypt, Nigeria and some other African countries that have significantly increased the participation of women in educational and leadership roles that the quality of their educational and political systems have improved. However, in Zimbabwe the enrolment trend at the Zimbabwe Open University (ZOU) has since 1999 been that one third of the students are women (Zimbabwe Open University Statistic Year Book 2003, 2005, and 2007). In fact the trend has continued because ZOU's Academic Registry records indicate that of those enrolled in 2009, 47% were female while 53% were male. On another note ZOU introduced higher degrees programmes in 2008 in the Faculty of Commerce and law and Arts, Education and humanities. To date only seven females out of 36 candidates are enrolled for DPhil programme in the Faculty of commerce and law while 27 females and 145 males are enrolled in Arts, Education and humanities. Furthermore, Zimbabwean women continue to face widespread poverty and heavy labour (Mutume, 2005). This is in contrast to what is happening in India where Janaki (2006) says open and distance learning has emerged as a boon to women of all ages equipping them intellectually through acquisition of knowledge, leading them to new radical methods of thinking, and taking them out of abject poverty.

A study of the commonwealth developing countries by Green and Trevor-Deutsch (2002) cites causes for low participation by women in open and distance learning as lack of access to electricity, lack of technology equipment coupled with socio cultural factors, lack of mobility, lack of relevant content and lack of infrastructure. The same study cited costs as a major cause for fewer women participating in ODL. The costs include but are not limited to ICT equipment, maintenance and course fees. It can be stated that access to tuition loan systems is minimal in ODL institutions. Thus potential students for ODL and their parents have limited access to extra funds. Therefore, tuition fees, books, educational supplies, and living expenses must be paid for by parents and students. This becomes a major barrier especially to women. Tanye (2008) and Kramarae (2001) echo the same sentiment when they state that women face barriers to participating in ODL such as costs, time demands, family demands and accreditation. In addition, Ablodun (2008) asserts that some of the reasons for low participation of women in ODL in Africa are:

- lack of adequate support to promote voluntary vocational skills development;
- unequal access to major sensitive information and educational activities;
- gender inequalities in management of distance learning programmes;
- stereotyping and lack of respect for the human rights of women; and
- under representation of women in higher education.

?? Although the Zimbabwe experience, discussed above, focuses on higher education. To what extent are the reasons for low participation outlined above applicable to the situation in your country? You could make reference to any level of the education system – primary, secondary, or tertiary.

The above studies indicate that there are numerous reasons why there is low participation by women in ODL. The major reasons cited in all the identified studies are those of costs and lack of time to study due to heavy domestic responsibilities on the part of women. The distance education practitioner needs to develop an awareness of these reasons in order to assist in the cause for increased participation by women in ODL projects.

The benefits of ODL to women participants

This heading may sound obvious to the reader, but the writers argue otherwise. There is so much that our governments and politicians take for granted. Whatever opportunity, no matter how small, when afforded to the female participants, will go a long way in uplifting their welfare both socially and economically. In both Botswana and Zimbabwe, numerous benefits are observable.

- Open schooling and distance learning are seen as ways of addressing the challenge of access.
- Through ODL women and girls are exposed to equal opportunities with men especially regarding jobs and decision-making. If women and girls who quit the formal system in Botswana are not given a second chance to study, they will always be left behind when opportunities avail themselves. But given the chance through DE, women and girls can compete with men on the same footing, and this is the “equal opportunities” talked of today.
- ODL can also be the leeway of exiting the vicious cycle of poverty that most women and girls are vulnerable to. With little education, girls and women will be exposed to poverty, abuse and other social ills. In the end they will be exposed to diseases and poverty.
- ODL helps empower both girls and women. By its very nature, ODL creates autonomous scholars and highly independent citizens. As such ODL will empower women and girls and prepare them for most challenges be they in relation to decision-making, policy formulation, research or any other field.
- ODL can give girls an opportunity to a rights-based approach to education, which can help them address some of societies’ deeply rooted inequalities. These inequalities condemn millions of children, particularly girls, to a life without quality education – and therefore, to a life of missed opportunities, (www.unicef.org). The whole point is that they can learn this at a distance, without necessarily having to leave their localities or workplaces.
- Through ODL women and girls who would have missed on their earlier educational opportunities receive relevant content. The diverse curricula by ZOU and the BOCODOL is cautiously designed and structured in order to reflect contextual issues, thus making it more relevant to learners. Issues discussed include *Botho* (Setswana)/*Unhu* (Shona)/ *Ubunthu* (Ndebele). When translated, the three terms mean the same thing, namely, *humanity*. In that regard female and male participants alike are taught how they should behave especially in this global village.

- The Botswana and Malawi experience, especially, has proved that distance education is capable of equipping both boys and girls with the knowledge and skills necessary to adopt healthy lifestyles, and protect themselves from HIV / AIDS and other sexually transmitted diseases.
- Quality distance education has also demonstrated in Botswana that the girl child who benefits from entrepreneurship courses such as the Small Scale Business Management programme offered at BOCODOL, enter into self-help projects without necessarily looking for jobs on the ever-shrinking job market. That way the girl child is capacitated to play an active role in making important decisions at the social, economic and political levels.
- Girls can, through ODL, learn about the dangers of drug and substance abuse and also know their rights, first as a people and also as women.
- The girls will also be exposed to the world of Information and Communications Technology, which they would have probably missed as they were out of the formal schooling set up. The Commonwealth of Learning website applauds ODL for increasing use of appropriate technology to extend education to marginalised groups, particularly women.
- ODL in Botswana, as in other countries, will help the country achieve the Millennium Development Goals (MDGs) 2 and 3 which focus on universal primary education and reducing the gender gap in education, and empowering women by 2015 (www.unicef.org). It is important to note that 2015 is a year just within reach, and it is the year in which children, particularly girls, and children belonging to ethnic minority should have access to and complete free and compulsory education of good quality. Countries should now be looking at ODL to help them achieve this noble goal. The MDG goal number 3 aims at eliminating gender disparities in primary and secondary education by 2015 with a focus on ensuring girls' full and equal access to achieving education of good quality (www.unicef.org/2006). This is a goal, which Botswana tried to meet though results are still unclear.

?? The Millennium Development Goals are a shared target among the SADC countries.

a. How can ODL methodologies, as an alternative to conventional education, enhance achievement of the goals?

b. What conscious steps are taken in your country to ensure that ODL plays its expected role of advancing the aim of achieving MDGs?

Your awareness of ODL methodologies will enable you to select those most relevant to your situation for application. In responding to question b. there is need to evaluate the circumstances for your ODL organisation, and based on that see if you can actively play a role to help your country use ODL as an instrument to bring about the desired change.

Strategies to enhance women participation in ODL

The enhancement of women participation does not occur automatically. Rather, it is contrived with the need to plan for it, strategise, and implement whatever policies may be deemed facilitative. It is argued that each individual country has the responsibility to actively pursue approaches best suited for it as these tend to vary from one country to the next.

A study in Australia by Clayton and Lynch (2002) on strategies to increase participation of women in computing programs cites government policy as one of the major strategies used to encourage women to participate in educational programmes. The sentiment is echoed by Zuhairi, Zubaidah and Daryono (2008), who give some of the following as ways to improve participation of women in ODL:

- Develop programs to accommodate the interests of women, which will benefit society at large. Such as programmes include child psychology, women studies, health sciences, foreign languages, business management and communication.
- Improve support systems that facilitate the learning process for women in attending higher education at a distance. Good examples are those programmes offered on-line, which are not constrained by the issue of distance.
- Provide scholarships for women and other forms of financial support. These could include partnerships with local governments and other interested agencies and institutions. Unfortunately many of our governments tend to sponsor only those women studying in conventional institutions, but not those studying by distance education mode.
- Build a good image and awareness of the community about the capacity of distance education to develop skills and competencies and improve the quality of human resources.
- The government of a given country should have in place an ODL policy at national level. Such a policy should, *inter alia*, specify opportunities availed to women participants, and these should be supported by specific implementation policies.

?? Go through the strategies carefully, and evaluate each one with reference to your own country. You should then add any other strategies that have been found workable in your situation.

Although literature search on strategies to boost participation of women in ODL gave a limited number of studies, the few studies indicated the need to motivate women to embark on ODL through different policies and practices.

Challenges

There are many challenges regarding the participation of women in ODL. The following are some of them.

- Governments in the sub region do not have national ODL policies to rationalise what considerations should be made about women learners.
- Generally, ODL is treated like an appendage of traditional education. That has several implications including the fact that it gets underfunded, and once it is under-resourced, the first to be affected are women who have always been disadvantaged.
- There are a number of countries in the SADC region, which have gone through conflict situations. Women usually bear the brunt and have to take care of the elderly, the sick and children. That means unless ODL as an alternative system of education is put in place, they will not be able to leave their localities to go and access education in conventional institutions.
- In some countries, women are allocated land without necessarily giving them skills required to make use of the land. ODL courses in basic Agriculture would be the most appropriate. However, the major challenge is lack of funding.
- The issue of gender is often misunderstood in our region. This is quite a challenge because people do not appreciate what is involved when we talk about gender and the discrepancies identifiable in the debate.
- ODL is not well publicised. This is a challenge because not many women in our countries are aware of what can be achieved through ODL.

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CHAPTER 9

Technical and Vocational Education and Training (TVET) Through Open and Distance Learning

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Some Questions

1. What insights does the DE practitioner need about facilitating access in the area of TVET through ODL?
2. What is TVET?
3. What is the currently prevailing situation about TVET in the SADC region?
4. What demands do the economies of SADC countries make from education systems regarding the issue of access?
5. What trends are evident in the provision of TVET in the SADC region?
6. How can ODL, as an alternative mode, increase access to TVET alongside conventional education?
7. What benefits accrue when learners study practical subjects through the DE mode?
8. What sort of courses are best addressed through the ODL mode?
9. What lessons can be learnt from SADC countries about the potential of ODL in providing access to TVET?
10. What challenges do institutions face regarding access to TVET through the ODL mode?

Introduction

In this chapter, the authors share insights about access to technical and vocational education in Southern Africa. The chapter demonstrates the demand for skills that is made on the education systems, and outlines developments that some countries have experienced. The starting point is a characterisation of how the conventional education system has gone about facilitating access to TVET. This will be followed by the argument that ODL has the potential of meeting some of the needs to skill citizens in the sub-region. Our countries have been described as developing countries, and in that regard the issue of access is crucial for economic, social and cultural evolution. In all the regions of the world, planning for access to education has taken centre stage especially in the purveyance of technical and vocational education and training.

At the expense of repeating the obvious, vocational education is defined as a “practically illustrated and attempted career instruction” (cf. www.vocationaltrainingguide.com). As such, a variety of components fall under the vocational education umbrella, and include: agricultural education, business, health, technology, trade and industrial education. This definition is echoed in the *UNESCO and ILO Recommendations* (2002:7) where technical and vocational education are described as:

Those aspects of the educational process involving, in addition to general education, the study of technologies, and the acquisition of practical skills, attitudes,

understanding and knowledge relating to occupations in various sectors of economic and social life.

This directly implies that to meet the demands of the economy, the skills and abilities of individuals must be developed and utilised to the fullest. Before reading ahead, reflect on the situation in your country by working on this activity.

?? How is TVET defined in the context of your situation?

It will be obvious that TVET could be perceived in various ways, but there is a commonly shared perception that TVET involves an amalgamation of theory and practice, that is, there is a practical element to courses in that field.

Trends in technical and vocational education and training

The publication in 1960 of the report of a commission on higher education in Nigeria, headed by Sir Eric Ashby (cf. Thompson, 1984) may be said to have marked the beginning of a new era in thinking about the role of education in development in Nigeria, and indeed in Africa as a whole. The report recognised the intimate relationship, which exists between education and economic development. It is necessary, therefore, to realise that the responsibility of governments to involve themselves directly in economic activities and to plan economic development was not as widely and fully recognised in the past as it is today.

As a direct consequence of the emerging realisation, technical and vocational education was added to normal school education. Both were financed from recurrent revenue, and such revenue was acutely subject to fluctuation year-by-year. This effectively inhibited forward planning and access. However, historical evidence deriving from studies of more advanced countries during their periods of rapid economic growth, notably the USA, the former Soviet Union, Denmark, Germany, and Japan, suggested that there had been a very significant relationship between their economic growth and the kinds of technical and vocational education provided to their citizens.

UNESCO largely generated the new wave of thinking about investment in technical and vocational education through a series of international conferences on educational planning held for various regions of the world at Karachi, Tokyo, Santiago, and for Africa at Addis Ababa in 1961. One notable pronouncement from the latter conference was:

There is no disputing that expenditure on some forms of education is an investment, which more than pays for itself even in the narrowest economic terms.

Governments were henceforth urged to plan educational provision continuously in relation to manpower needs at all levels.

?? By closely examining the Addis Ababa pronouncement, what steps did your country take to ensure investment in TVET?

In order to respond to this question, you need to do a bit of investigation so as to establish the history of TVET offered through conventional means to the present day.

Responses by African countries

The response by African governments has been to provide technical and vocational education for rural and urban development. Initially, introducing technical subjects in the secondary school curriculum did this.

For example, in the then colonial Rhodesia, a new look type of secondary school was introduced. Two thirds of the subjects offered were supposed to be practical subjects. The technical and vocational subjects offered in a given school depended on where the school was located. A school in a rural area would offer agriculture, building, and home economics. An urban school would offer woodwork, metalwork, and technical drawing. The thinking was that learners would acquire skills that enabled them to find jobs in the environment where their school was located.

Botswana originated the brigades, a pattern of technical and vocational training for out-of-school youth in 1965, and Kenya took up the model for its village polytechnics. Brigades were initially conceived of as a means of providing a more appropriate form of training than that afforded by conventional secondary school courses. Brigades were associated with secondary schools e.g. Swaneng Brigades in Serowe and Madiba Brigades in Mahalapye. More recently the brigades system has evolved independently of the formal school system, whilst continuing to offer a balanced combination of general education and skills training. Brigades seek to promote rural and urban development and operate in various fields including building, carpentry, agriculture, mechanics, textiles, etc.

These examples of providing access through conventional institutions typify what has been obtaining in all countries of our region. However, success has been limited for a number of reasons such as:

- i. The status of technical subjects and that of teachers responsible for teaching them tended to remain low
- ii. The training attracted lower-ability learners and those who failed from academic streams
- iii. Even within the practical courses, the tendency by teachers was to increase emphasis upon theoretical aspects – the more elevated feature of academic institutions
- iv. There were limited opportunities for employment to absorb products from the institutions
- v. In circumstances where such access was successfully provided, vacancies tended to be limited. A formal classroom can only take so many but not more

?? Five reasons have been given to show why success in the provision of TVET was limited. Examine each reason, and explain in what way it has been a limiting factor to the provision of TVET in your country.

Responses to this activity will vary mainly because countries have different situations. Notwithstanding that, some commonalities can readily be identified. For example, the issue of the low status of practical subjects vis-à-vis academic subjects has always

been low in many countries. Similarly vocational and technical subjects have often been associated with lower ability learners, an attitude that has remained persistent.

How is the situation currently unfolding?

For a fact, there is increased awareness of the need to improve access. Conferences are held regularly, statistics are shared, separate budgets for technical and vocational education are allocated, and there is increasing awareness of the mismatch between technical and vocational skills and availability of skilled manpower as illustrated in the following cases.

In the humanitarian news and analysis, IRIN (2008) observed that the legacy of apartheid haunts vocational training in South Africa. These points are particularly noteworthy about the situation:

- i. Access to structured education and training is far greater for urban than rural populations
- ii. Too little of the new educational system reflects the needs and interests of the most disadvantaged members of the South African society
- iii. There have been long-standing complaints that the country has tended towards underdevelopment of intermediate-level skills
- iv. Managing the paradox of developing skills in a hostile labour market and environment, where unemployment is growing steadily is the greatest challenge for the emergent system

?? To what extent do these points reflect the situation in your country?

It would seem the four points speak correctly about the circumstances experienced in the SADC Region.

The Project Information Document (PID) (cf. IRC@col.org) also reinforces the above. It notes that Mozambique provides an example of steady economic recovery and social reconstruction after a prolonged period of war. Notwithstanding that, data from the national household surveys of 1996 and 2002 show that:

- i. The employment segment is growing and demanding more skilled labour
- ii. The shift in the skill profile has triggered a sharp increase in the need for technical and vocational skills especially in metal, gas, telecommunication, and agriculture
- iii. The training system responsible for shaping the skills profile has been slow to respond to the changing labour market demands
- iv. The TVET provided mainly by the National Directorate of technical education (DINET), the Ministry of Labour, NGOs and churches provides limited access
- v. The World Bank (2004) identified relevance, quality, access, and equity as some of the key issues to be addressed

Both the South African and the Mozambican situations echo what can easily be observed in the other countries in our region. There is effort by individual countries to

address the issue of access collaboratively with stakeholders. For example, at a workshop held in Gaborone in 2002 (cf. www.unevoc.unesco.org) countries identified areas of common interest among member states of SADC in TVET reform. Projects were identified and elaborated jointly.

In the foregoing discussion, which focused on access to TVET through conventional educational practices, five points are worth noting, namely that:

- i. Where access was successfully provided, vacancies tended to be limited
- ii. Access favours urban populations more than it does rural ones
- iii. Intermediate skills remain underdeveloped across Southern African countries
- iv. The employment segment continues to require skilled labour that is not available
- v. Training systems have been slow to respond

This *status quo* argues for alternative means of training, and distance education (DE) is considered to be a viable alternative. DE is the general term that includes the range of teaching and learning strategies used by:

- i. Correspondence colleges
- ii. Open universities
- iii. Distance education departments of conventional universities
- iv. Private sector organisations

Thus, the term is used to refer to the education of those who, for one reason or another, are unable to attend conventional schools, colleges, or universities but study at home.

One of the most comprehensive definitions is by Keegan (1996:44) in which six defining elements of DE are suggested. He observes that DE is characterised by:

- i. the separation of learner and tutor as opposed to face-to-face teaching
- ii. the influence of an educational organisation which distinguishes distance education from private study
- iii. the use of technical media, e.g. print, audio, or website to unite tutor and learner
- iv. the provision of a two-way communication so that the student may engage in dialogue with the tutor
- v. the possibility of occasional meetings for purposes of interaction
- vi. the self-directed nature of the learner's involvement

The next logical question to ask is: Why distance education? The following are some of the motivations to pursue TVET through the DE mode:

- i. The learner does not have to leave the job (losing a salary) in order to do studies
- ii. What the learner studies has a direct bearing on career prospects, and that makes the study more meaningful and holistic
- iii. There is no worry about failing to get a vacancy as happens in

- iv. conventional schools. Normally there is no question of classes being full
- v. It is not necessary to stick to specific hours of study
- vi. When studying at home the learner gets the support of family members
- Distance education fees are comparatively lower.

?? By closely looking at Keegan’s characteristics of DE, and reasons for exploiting the potential of ODL, Suggest how the situation in Mozambique, South Africa (as outlined above) can benefit from the philosophical foundations of ODL.

DE has become a viable option because conventional institutions cannot meet the increasing demand for education. As an example, in 1993 the University of Zimbabwe could only accommodate 23% of Advanced Level school leavers who qualified to enter university. The situation led to the eventual establishment of the Zimbabwe Open University.

Situations for Distance Education Interventions

Distance education intervention has as one of its primary objectives the alleviation of poverty, and skills development in order to enhance economic development. Skills training through distance education can improve the performance of both the informal and formal sectors. With particular reference to the former, from mere observation, Southern Africa’s informal economy has prospered in part because formal economic structures cannot sustain the increasing numbers of job seekers. Freeman (2000:4) writing in the *African Security Review* has observed that, “high unemployment statistics in Africa are one clear indication that most people are excluded from the formal economy and are thus driven into the informal”. Others choose the environment of the informal economy because it allows them more freedom to manouvre or avoid regulations that could impinge upon profits.

Small businesses have thus proliferated on city streets, residential areas and villages. Unskilled traders, who are averse to dependence, conduct such enterprises. The survey conducted in Gaborone (Botswana) by BOCODOL (2001) established traders who run food outlets, roadside kiosks, hair salons, poultry projects, guest houses, taxis, etc. do not have any training and expressed a wish to access basic training in business management. Many of them had been working in the formal sector but had been retrenched as the economy continues to face viability challenges. In fact the unemployment and inflation rate in SADC countries is high compared to developed countries as illustrated in the following statistics from some of the countries.

Country	Unemployment rate %	Inflation rate %
Mauritius	9.4	8.9
South Africa	25.5	5.0
Lesotho	45	5.0
Mozambique	21	12.8
Botswana	23.8	11.4
Zambia	50	8.8

Namibia	5.3	5.0
UK	2.9	2.3
USA	4.8	3.7
China	4.2	1.5
Japan	4.1	0.4

(Source: Nationmaster.com 2003-2008)

?? Statistics are a graphic way of presenting an argument. Looking at these statistics, what further arguments can you create that relate to access of TVET through ODL?

The point to note is that where the rate of unemployment is high, inflation is also correspondingly high and vice versa. If unemployment in our countries continues to escalate, then it makes logical sense to increase access to technical and vocational training so that citizens can engage more profitably in the informal sector towards self-reliance. It is better to be skilled and unemployed, than to be unskilled and unemployed. This can best be done through DE mode. As observed in the definition of distance education, access for almost any course is limitless, and those disadvantaged (e.g. those who live in remote areas) can draw benefit. Increasing access has become more urgent than before in a number of situations, which include:

- i. Post-conflict situations, where citizens for years have been deprived of opportunities for skills development. Clear examples are those situations where war had been raging on and now there is relative peace.
- ii. Situations where political dispensation favoured a particular racial group in terms of skills training. With the coming of independence, the disadvantaged hold legitimate expectations for training.
- iii. Situations in which a government turns against its own people to maintain political power resulting in brutalisation of the citizens by state machinery to silence them. In such a situation training institutions collapse and there is decay as reflected in a high rate of unemployment and inflation.
- iv. Situations in which citizens are displaced or reallocated pieces of farm land without the necessary skills in agriculture.
- v. Situations in which the government recognises the need to empower its citizens, but finds that conventional training institutions cannot meet the demand to train its people.

?? Five situations where ODL can play a role are listed above. Looking at the SADC countries, which ones would you list under each point? Where would you list your country?

Countries that fall in the first category include the DRC and Angola. South Africa seems to fit into category ii., while Zimbabwe is a ready example for categories iii. and iv. Countries like Botswana and Mauritius fit into category v.

Technical and vocational training that can be offered through distance education

There are three categories of courses that can be offered through distance education. The first category comprises school equivalence courses that are offered for those who would like to complete the high school certificate. These are regarded as important for general literacy, and are foundational to skills training.

The second category is made up of generic courses such as communication, numeracy, basic computing, entrepreneurship, change management, project management, to name a few. These are offered to develop new or enhance already acquired technical and vocational skills. The courses are offered either as in-service or pre-service interventions. Courses in this category do not require any special equipment, and can be easily taught at a distance through print media, occasional face-to-face interaction, as well as on-line.

The third category is made up of more technical courses such as farming for smallholders, cell-phone repair, tourism and hospitality, guest-house management, travel and tourism, beauty therapy, horticulture, nursing, etc. There are two components to these courses, namely the theoretical and the practical. The study material for the theoretical aspect can easily be prepared so that learners can read on their own and respond to assignments. The institution can also organise face-to-face meetings with learners, supported with tutor-marked assignments.

The second component of the above category is hands-on or practical experience. The learners who will be doing a particular course can easily arrange for attachment. For example, somebody doing the course on farming for smallholders can network with farming enterprises in the community to apply theoretical ideas. Taking into account cell-phone repair, INTEC College (South Africa) notes that there are over 30 million cell phones in South Africa, and the growth shows no sign of tapering off. In other words, the cell phone industry is one of the fastest-growing industries in the world. For that reason the repair industry is a huge market. There are, therefore, increasing opportunities for people who have a good understanding of how to repair phones.

In addition to study material on the theoretical aspect, such a course could have a practical instructional video that will walk the learner through the practical aspects of the course. The video serves in lieu of the tutor.

?? To what extent do you agree with the above categories? What other areas in your own country can be added?

There is no right or wrong answer here, except that your context will be unique, so whatever categories you add will be legitimate in as far as ODL is used to successfully provide access to TVET.

The BOCODOL experience

The Botswana College of Distance and Open Learning has continued with its original mandate of offering school equivalence courses (Category 1) by distance mode.

In the generic courses, the College has developed and delivered communication courses for middle managers in industry and in the public sector. Its Interactive Communication for Industry (ICI) has been offered to VOLVO Truck and Bus Builders (Pvt. Ltd.) Botswana. The course takes a period of three months. During that

time, learners read the study material, attend weekend tutorials, work on tutor-marked assignments, then sit examinations for the intermediate certificate accredited by the Botswana Training Authority (BOTA). The same course has also been offered to employees of the Botswana House of Assembly.

The College continues to offer its popular entrepreneurship course known as the Small Scale Business Management (SSBM) to small scale traders, and workers in both the private and public sectors who are either running their own businesses or intend to start some. This six-month course is mainly done through the print medium and plans are at an advanced stage to offer it online. The course equips participants with requisite management skills to manage a small business. Participants arrange for their own attachment. The intermediate certificate qualification is accredited by BOTA.

The College continues to deliver the course developed specifically for the Botswana Police Service (BPS). It is called English for Professional Purposes (EPP) and aims to equip the police with key skills such as statement writing, investigation procedures, report writing, translation, court procedures, cross-cultural language issues, reading workplace documents, effective oral communication, and listening skills to enable them to conduct policing duties more efficiently. The BOTA accredited programme lasts 12 months, leading to the award of a certificate. In addition to the modules designed specifically for distance education, there are audio recordings, tutor-marked assignments, and end-of-course examination, supported with weekend face-to-face tutorials.

The College also offers Basic Computer Skills by distance mode. Print study materials prepared in line with distance education principles are issued to all registered learners. These mainly deal with theoretical aspects of basic computing. During weekends, learners are exposed to hands-on practice at computer laboratories countrywide. These are in secondary schools and technical colleges with whom special arrangements are made. The examination involves both practical and theoretical components leading to the award of a foundation certificate accredited by BOTA.

Last but not least, the College offers face-to-face short courses. These range from three to five days and are prepared on request. So far courses on Supervision, curriculum development, marketing and public relations have been offered. The decision to offer face-to-face courses is considered to be in line with the concept of open learning, where the College has had to be flexible in order to respond to the demand for training.

?? What lessons can your institution draw from the BOCODOL experience?

It is the essence of ODL institutions to benchmark and draw lessons from comparable institutions. The authors argue that experiences drawn from BOCODOL or ZOU should encourage reflective thinking in different organisations. Such reflection will then be used for decision-making, and strategic planning. To extend the argument further, where certain practices can be adopted/adapted by sister institutions, there

will be no need to re-invent the wheel when relevant programmes or systems are already in place.

The ZOU Experience

The ZOU experience takes a higher step by describing the proven possibility of offering a programme with a practical inclination at degree level. This is a clear illustration of what can be achieved through ODL.

The need to train nurses at higher level came about as a result of the continued brain drain of nurse experts to other countries. The Bachelor of Science Degree in Nursing Sciences for the Zimbabwe Open University was launched in September 2000, after the training nurses by Distance Education was viewed as a feasible mode. Only those nurses who hold a certificate in Nursing at Diploma level are recruited for the degree programme. These nurses are trained to execute their duties expertly and are required to enhance their practical skills. It is understood that technology assists in the reduction of the distance between the learner and the tutor. However, in Zimbabwe, stakeholders continue to question the ability of ZOU to fulfil the practical skills component by Distance Education.

The nature of the science discipline is such that students need to participate in practical work and experiments. This requirement creates a challenge for distance education institutions because of the difficulty to get students to health institutions where typical situations can be availed. Nursing is one vocational programme that demands the mastery of practical skills. Tutors need to understand the needs of distance learners in order to be able to give the expected assistance. Research illustrating the extent to which students can be taught practical skills through the distance education mode is somewhat scarce (Watson, 2002).

Documented information on how ODL institutions impart practical skills competencies to science students is also limited. Whilst the mastery of scientific knowledge is essential, linking theory to practice is even of greater importance. The ODL programme needs to ensure that, at the end of training, the graduates excel in the execution of their duties. Programme evaluation is one of the ways to confirm successes in conduct of practical skills competencies by ODL programmes. One unpublished report carried out at ZOU, listed the following findings on the conduct of the nursing degree by distance.

- Students are attached for internship; are supervised and then compile reports that they submit to the university.
- Students are attached to laboratories where they conduct practicals.
- Members from various fields, who in most cases, are part-time employees of ZOU, supervise and guide students during the internship period.
- Lecturers and students engage in group demonstrations and return demonstrations.
- Students are attachment to their areas of specialization with specific objectives to be achieved. They are followed up and evaluated by mentors. Both mentor and student write and submit reports to the university.
- In some instances, students go on field observation visits for their practical experiences.

Thus the findings demonstrate beyond any doubt that access to technical and vocational programmes can be achieved through distance education. The unpublished study also went on to establish what lecturers and students cited as the strengths and weaknesses of the programme offering. The following were cited as some of the strengths:

- students learn on the job;
- recruited students, who already hold diploma qualifications, have prior experience to base their studies upon;
- students receive support from part-time tutors *in situ*;
- the programme enjoys cooperation from part-time tutors and hospital mentors; and
- students have access to well written modules, which they use to support practical work.

However, both students and tutors have also identified some weaknesses. These are some of them:

- follow-up of students by university lecturers is considered inadequate;
- there is a shortage of mentors and instructors in the hospital or clinical settings;
- the equipment in clinics and hospitals tends to be antiquated, and there is also a shortage;
- there is limited access to computers; and
- some lecturers are not familiar with DE practice, which results in poor evaluation of students.

These weaknesses result in compromise on quality. To reflect on the foregoing, work on this activity.

?? With reference to your own institution:

- List the programmes that are offered by DE, which require conduct of practical activities.
- How do tutors assist students to fulfil the practical component?
- What role does technology play in conducting practical activities.

Your response is personal, but very useful because it helps you reflect on the situation you work in.

Much debate has gone on about the significance of practical work in making distance education respond to the ever-increasing demand for access to technical and vocational education (Watson, 2002). Barron (1987) reiterated that with advances in technology and the rapid growth of the world-wide-web in recent years, distance learning is competing favourably with formal education. The use of teleconferencing, videocassettes and other interactive technological systems, may enhance the demonstrations and return demonstrations between the tutors and students, when dealing with mastery of practical skills competencies.

For ZOU, the drive to increase and reach out to a larger group of students continued. Video Cassettes for Human Anatomy were developed for nursing science students.

Other cassettes developed were on Biophysics as well as Microbiology and Parasitological. Each Regional Centre received a set of videocassettes and had their cassette player and monitor. Students would gather together at scheduled times where they would watch the various cassettes. The RPC conducted the sessions on scheduled days. A system was developed whereby students, who had facilities at home, would borrow cassettes for a stipulated period. The cassettes would be rotated to students in the region. Imagine the benefit this would bring to ODL if the cassettes also included some practical demonstrations? The system, although not entirely holistic in its approach, managed to enhance accessibility of learning materials to students as well as ease off the critical shortage of nurse experts. Students are now able to submit assignments online. E-tutors mark the assignments and timeously give feedback to students online.

Staff Development

In order to strengthen the use of technology in the delivery of the degree programmes, universities need to send faculty members for staff development courses in DE. It is hoped that further advancement in the use of technology will enable SADC countries to link up and conduct ODL programmes that include practicals, through video conferencing and other technological means. Technology makes the demonstration of some procedures on video, possible. However, as mentioned earlier, technology may not substitute the hands-on experience entirely in such professions as nursing and medicine. These are humanistic and practice-oriented disciplines that anchor their conduct on the social and behavioural skills acquired through well structured training programmes.

?? After reading the ZOU experience, what tertiary programmes would you encourage your institution to offer through the distance mode?

Borrowing a leaf

Australia is an example of a success story in providing technical and vocational education through distance education. Parker (2007) notes that from around 1987 to the present, major industry reforms (in Australia) started to produce dramatic context shifts for technical/vocational training. She notes that technical/vocational distance education :

- i. has developed resource-based training, which readily adapts to modularised self-pacing and competency based approaches;
- ii. has consistently used a wide range of teaching/learning strategies beyond those of traditional face-to-face institutions; and
- iii. technical/vocational distance education is perceived as offering economies of scale for large and expensive government training system

Recommendations

In view of the fact that conventional organisations are unable to cope with the demand to offer technical and vocational courses, it becomes palpably clear that distance education interventions can make a meaningful contribution. The following recommendations are, therefore, made to providers in our respective countries:

- i. Institutions that provide distance education should conduct feasibility studies to establish technical and vocational education courses deliverable at a distance.
- ii. Institutions should form alliances with conventional technical and vocational education providers and convert some of the courses to distance education mode.
- iii. Institutions should network with sister institutions in the region in order to adapt relevant programmes. It is better to take this route than to re-invent courses already available elsewhere.
- iv. Institutions are encouraged to network with industry thereby laying foundation for industrial attachment for projected TVET courses.
- v. Institutions are encouraged to develop a menu of short courses in response to the needs of their respective economies.
- vi. Governments are urged to avail funds to DE institutions to enable such providers to implement skills development projects.

Challenges faced in accessing TVET through ODL

It will be clear from the foregoing discussion that there are numerous challenges facing the provision of TVET through conventional means, and those challenges are serious enough to warrant a revisit of the way our technical colleges and polytechnics should operate. When it comes to distance education, the challenges are even more serious given that DE provision has distances to transact. Also, unlike conventional provision, open and distance learning methodologies have not been tried and tested especially in new environments. Some of the challenges are:

- staff shortages and the lack of expertise in ODL;
- limited resources, especially where practical skills training is involved;
- lack of IT and the expertise in using available resources;
- poor communication systems aggravated by vast distances;
- the lack of collaborative partnerships between ODL institutions and industry for purposes of attachment and internship;
- compromise on quality due to lack of resources; and
- poor attitude towards distance education in general.

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CHAPTER10

Guidelines for Writing a Research Article for Publication in a Refereed Journal

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Some Questions

1. What are the characteristics of a successful writer?
2. What should be taken into account regarding the readership?
3. What characterizes the art of scholarly written communication?

4. What is the significance of referencing in writing a journal article?
5. How is a good article structured?
6. How does plagiarism affect the quality of an article?
7. What are some of the common mistakes made by budding authors?
8. What are some of the challenges faced by writers in ODL journals in Southern Africa?

Introduction

The penultimate aim of any higher education researcher who has an inner drive to express intellectual creativity and be acknowledged for scholarly contributions in their fields of endeavour is to publish in reputed journals. Job insecurity and the desire for promotion have also put researchers and academics in higher education under mounting pressure to ‘publish or perish’ in an environment where the growing number of researchers and academics creates more competition for the few available jobs. However, in spite of many pressures to disseminate one’s work in scholarly journals, getting one’s work published is often frustrating and stressful to the young academic who, having conducted a study, analysed data, written a manuscript and now wants to communicate to the world the exciting findings, discovers that there is no editor willing to let that happen. Publishing research work in a reputable journal is often a lengthy process that is moderated by a journal review process that is managed by an editor.

The art of academic writing or writing for reputable journals is neither easy nor simple but may be costly to one’s career because of the potential risks of deliberately or inadvertently engaging in fraudulent practices. Reputable journals engage in peer reviewing or refereeing process, which subjects scholarly work to ‘blind’ scrutiny as a means of establishing the quality of the manuscript and moderate potential risks of fraudulent practices. The purpose of this chapter is to increase the chances that a manuscript will be accepted for publication in a reputed journal. In doing so, the chapter explores critical qualities and attributes essential to writing a scholarly manuscript, examines the standard structure of a scholarly article and discusses common sections of a research article for publication in a reputed education or social sciences journal. Finally, the chapter discusses several frequently made mistakes that often undermine the acceptance of research articles for publication in peer-reviewed reputable journals. The ideas discussed are of immense value to budding writers in open and distance learning (ODL).

Characteristics of a Successful Writer

Academic writing can be intimidating and stressful, especially if you are a new writer, because to learn how to successfully combine complex findings with relevant literature and make insightful analysis and package it into a coherent piece of work is an art that takes years to master. Since these demands are very heavy and can easily frustrate and wear down a new or young academic, it is important to examine some characteristics and make some general observations that contribute to the making of a successful writer of a scholarly article for publication in a reputed journal.

Hallmarks of a successful writer

The hallmarks of a good researcher or writer are many and varied. However, this section highlights only three major attributes of diligence, self-discipline and perseverance. Diligence is more than hard work, it calls for conscientiousness in paying due consideration to a task and giving care to a given situation. It is a quality often associated with good researchers and writers, because research work calls for hard work. It is not easy to find successful writers and researchers who are not committed to hard work. In addition, research calls for a lot of self-discipline on the part of the researcher in meticulously following research procedures and not seeking short cuts and in adhering to self-imposed timelines. The researcher should not give up even when an article has been rejected by one journal. One should try another and keep trying.

However, the journey to publication calls for more than diligence and self-discipline. Perseverance is an important attribute for a writer because the journey is long and full of challenges that could easily lead to discouragement and frustration. Many young researchers often become disheartened when they discover that the time it takes from first submission to actual publication of the paper may be inordinately long, even as long as two or more years. This is because without experience in journal article writing, getting a research paper published initially requires extensive corrections and re-writing of the original manuscript. Therefore, to sustain and see oneself through this long journey calls for tenacious perseverance, always keeping in mind that the benefits of the end results that await you are greater, more fulfilling and enduring than the costs of the long journey to publication.

?? Identify three important hallmarks of a successful writer and explain how these contribute to successful writing of a journal article. Reflecting on your experience as writer of journal articles, which of these attributes do you consider the most important and why?

In addition, an important personal perspective for a successful writer of scholarly manuscripts is to consider yourself as both a writer and reviewer or critic of your own work. This is an important quality or personal disposition for a writer who wants to improve the quality and enhance the chances of a manuscript being accepted for publication. This disposition prepares the writer to anticipate and attend to concerns and queries that might be raised by reviewers or readers of the article.

Brainstorming

Before commencing writing, it is prudent to consult appropriate literature and then share ideas and brainstorm with colleagues. Brainstorming helps in generating lots of ideas about the paper, including the topic or title, content areas, journals and other possible references and structure. It helps to consult colleagues, bounce ideas, and discuss with them during this pre-writing stage. The significance of brainstorming in enhancing the quality the research article should not be underestimated.

Brainstorming also helps in addressing the relevance and significance of the paper. Through brainstorming the writer is able to delve into the findings of the study, revisit the hypothesis, consider the significance or the value-added benefits of the study and develop an outline of the paper.

Brainstorming contributes significantly to the quality of the paper and enhances the chances of acceptance of the manuscript for publication in a peer-reviewed journal. Following brainstorming of the results, it is important to sift through and evaluate them to determine primary and secondary findings. Screening and evaluating the results help sharpen the focus of the paper so that the report concentrates on the most important finding or group of highly related findings. Do not allow spurious or multiple findings to confound the significant contribution that the paper is adding to the field of research. Therefore, consider writing several papers if, during brainstorming, it is established that the study has multiple primary findings.

Stylistic Guidelines

Scholarly journals invariably publish their stylistic requirements for prospective authors, or provide them upon request, or online. Therefore, be familiar with and adhere to the stylistic guidelines of any journal that you would like to submit a manuscript for publication. Otherwise many editors simply return manuscripts that do not adhere to their requirements and request that they be presented in accordance with the stylistic requirements of their journal before resubmission.

Preliminary Observations

One of the reasons why many new writers or young academics do not publish is because they have no understanding of how a manuscript for a peer-reviewed journal should appear. The second challenge and obstacle that confronts them is that they do not appreciate that writing a paper for publication in a peer-reviewed journal requires very careful planning and forethought that takes into account several considerations. Therefore, before discussing how a good research article should be structured and written, it is worthwhile to take some moments and make some preliminary observations that enhance the writing of articles for refereed journals. For this reason, five major preliminary elements that should be considered by a writer are briefly discussed in this section, including purpose, readership, communication skills, stylistic guidelines and adherence to deadlines. Before moving on to the five elements, reflect on the foregoing ideas by working on this activity.

?? Suppose you are an ODL practitioner, and have been toying with the idea of getting an article published. How much time and attention have you given to:
a. brainstorming your ideas with colleagues?
b. establishing the stylistic guidelines of some of the journals you think can publish your article?
c. taking into account some preliminary observations.

Purpose

When writing a research article there are two main purposes a writer should

constantly keep in mind. The first is the purpose of the research and the second is the purpose of writing the paper. The former purpose will be discussed later in this chapter. For now, however, the focus of this section is to explore the purpose for writing the article.

Since purpose is one of the key elements of every scholarly article, the writer must ensure that the purpose of the article is explicitly stated and that it always stands out so that it constantly reminds and guides your writing from straying away from the article's purpose. To do this successfully, you must first of all be clear in your mind about the purpose of writing the article. The primary purpose of writing a research article is to disseminate your findings and share with the world what has been learned from the study. Therefore, you should be equally clear about the key findings of your study. Avoid spurious findings and dwelling on anomalous results that end up confounding, clouding and eclipsing the real findings and purpose of your article. When writing a research article bear in mind that the main purpose of writing is to:

- inform the readers of the problem that was investigated,
- communicate why it was worth investigating,
- specify steps in the research process or how the investigation was conducted, and
- share the key results and conclusions.

Please note that as author, your and responsibility convince the reader report the findings investigation. provide readers detail so they can own conclusions of the research credibility of veracity of

reached. According to Bem (2003), a research article is a straightforward tale of a clearly circumscribed problem needing a solution; not a novel, which has plots and subplots, literary allusions and flashbacks. Therefore, the art of communication is important when writing a scholarly article for publication in peer-reviewed journal.

?? a. Why should you consider readership when writing a research article?
b. What is the relationship between readership, the art of communication and the purpose of writing a research article?

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Readership

Research findings in education, or specifically distance education, are often of interest to a wider public than disciplines such as basic sciences and other highly technical fields. It is therefore important to know your readership because one of the main reasons for rejection of a journal article, apart from non-adherence to a journal's stylistic guidelines, is failure to "address the interests/needs of a journal's readership" (Plawecki & Plawecki, 1998:25).

Most readers of education journals possess a broad knowledge of the field, although many of them may not be familiar with the cited articles and other reference materials. Therefore, direct your writing to be comprehensible to as wide an audience

as possible, assuming that policymakers, school teachers, distance educators, education students and laypersons will be interested in and access your paper. Education readers generally prefer simple, clear, accurate, and coherent writing to complex, verbose, and pseudo-scientific writing. However, not all sections of a journal article can be written in simple and less technical language. Therefore, while the introduction and discussion sections, in particular, should be available to a wider readership, the methodology and results sections, which are more technical, require more technical skills. However, resist over use of jargon or technical language.

The Art of Scholarly Communication

Whether one is writing a technical report, such as a journal article, or an informal letter to a friend, it is important to communicate well. For many people good writing is challenging and often demanding. Technical writing is a genre that is learned and yet the best way to learn and improve journal article writing is to practice writing. However, through practice one soon learns that the primary consideration in writing a journal article is not to sound academic, rather the focus and criteria should be clarity, conciseness and organisation. Therefore, do not compromise accuracy and clarity with a desire to impress the reader with eloquence and grandiloquence. Remember that the primary purpose of writing a scholarly manuscript is to communicate coherently using your own voice, citing smartly and using examples to illustrate what is being communicated. Above all, remember that in technical writing good organisation enhances clarity and conciseness.

Organisation

The precursor to clarity is good organization. Organizing a research paper has several purposes, including enabling readers to examine your work selectively by concentrating on those aspects of the paper they are interested in. For example, a reader who wants to know whether the paper has relevance for his/her study might be interested in the research method used in the investigation or interested in a specific result, interpretation or just the conclusions. Therefore, a good scholarly research report normally follows the outline of the research process used to guide the study. Good organisation also provides a structure to generation of ideas and enhances readability by providing for a logical flow of ideas.

Academic journals normally require that you follow a specific structure. Therefore, it is important that you should first be familiar with the journal's standardised format for journal articles and then religiously follow it if you would like to submit your paper for publication by that journal. Use the standardised format of the journal to develop your own outline of each section of the prescribed structure. This helps you examine the logical flow of ideas within sections, spot important misplaced or missing points, and define paragraphs.

A paragraph is the basic unit of organization in English prose, often containing one idea. It is the primary organising unit, which is characterised by internal logical consistency and logical flow with other paragraphs. It should not contain unnecessary or superfluous sentences, which introduce nonessential content into the writing, or content that strays from the basic narrative line. The sentences in a paragraph must support the idea contained in the paragraph and not mask the main idea of the paragraph. Therefore, just as a paragraph should not contain excessive sentences, a

sentence must also not contain unnecessary or superfluous words, because this often undermines the writer's direct expression of the purpose and meaning of what the sentences seeks to convey.

Simple and Concise Writing

Just as organisation is important in technical writing, such as scholarly manuscripts, so is good writing. Although writing a journal article entails technical writing, journal editors prefer simple, concise and coherent writing to flowery, verbose, and flamboyant or grandiloquence that often leave the reader struggling to grasp the storyline. Always bear in mind that the main purpose of writing a research paper is communication. Therefore, anything that obscures communication should be avoided. In that case, be simple without being over-simplified.

- Be concise without being choppy or jerky.
- Be scholarly or technical without being pseudo-scientific.
- Be coherent without being pretentious.

Use Your Own Voice

When writing an academic paper, there is always need to consult work carried out in the area of research. As a result, academic writing often involves lots of quotes. Quoting previous work could be risky for a novice for several reasons. It is very easy to quote excessively that you end up obscuring your own voice. Always define concepts in your own words, and if possible, use original examples to explain these concepts. Budding writers are often tempted to throw in direct quotations because they think their own words do not match those used by the author, especially if it is someone famous. However, it is noteworthy that explaining a concept or idea in one's own words could inadvertently lead to plagiarism if not carefully done.

Plagiarism may involve intentionally or carelessly representing in an academic exercise the work of another person or source as one's own without giving appropriate acknowledgment. It includes representing all or in part another's ideas verbatim, paraphrasing, etc. without citing the source in the text and in the reference list. It is tempting for many young researchers to change a few words in the source and call it rewriting or paraphrasing.

Except for **common knowledge** (information generally known and found in several general reference sources, for example, Mandela spent 27 years on Robbin Island, all ideas or statements borrowed from other sources, and all factual or historical material) must be properly cited in the text and references, based on the APA Guidelines, which require that all direct quotations must be shown by the use of quotation marks or, for longer quotations, indent single-spaced text. A few examples are provided below to illustrate the danger of plagiarism.

- a. **Original text:** The devil would either like to keep you blind regarding his existence and activity or take you to the other extreme where he becomes your focus rather than the Lord Jesus Christ. He loves it when you see him in everything, when you credit him with all your problems, and when you ascribe to him all your defeats. (Arthur, 1991:169)

- b. **Plagiarism:** Arthur (1991) says that the devil’s strategy is to keep you ignorant of his reality, but likes it the most when you see him in all your misfortunes and you credit him with all your problems, and when you ascribe to him all your defeats.

Why plagiarism? The paraphrase uses the source’s exact words without putting them in quotation marks.

- c. **Correct** (with quotation marks): Arthur (1991:169) says that the devil’s strategy is to keep you ignorant of his reality, but likes it the most when you see him in all your misfortunes and “you credit him with all your problems, and when you ascribe to him all your defeats”.
- d. **Correct paraphrase:** Arthur (1991) says that the devil’s strategy is to keep you ignorant of his reality, but likes it the most when you see him in all your misfortunes and live in fear of him as the source of all your problems and defeats.

Cite Smartly

Whenever you write a scholarly paper there is always the need to refer to the work of other researchers and describe their research contributions and ideas, in relation to your own work. Citations are a key feature of academic writing; it is inconceivable to write a journal article in education without citations. Therefore, whenever you refer to previous work, whether it is by direct quotation or paraphrasing the ideas, theories or research work of other scholars, it is imperative that the source of your information is explicitly indicated in your paper so that readers know to whom the work is attributed.

Correctly attributing the source of your information does not only help the reader know the source so that they could consult for more details, but has several other advantages. First, it demonstrates to the reader your knowledge of the literature in your area of study. Second, it protects you from accusations of unintentional plagiarism. Besides, it assists the reader to check the credibility and accuracy of the source and citation. Finally, citations serve as an invitation to the reader to read and learn more about your study and the body knowledge that supports the area of investigation.

However, it is important not to overdo your citations. Instead try and find a good balance of citations, without leaving out pertinent writings in the field, while at the same staying clear of works that are peripheral to or only related tangentially to your study. Also consult recent books and journals to make sure you do not miss significant and recent contributions. Finally, your references and in-text citations should also tally.

Meanwhile, be prudent with citations and avoid citing work that is tangentially related to your research. At the same time, avoid bottomless parenthetical references, for example:

Other challenges faced by distance learners include lack of time, work pressures and responsibilities, domestic interruptions, isolation and shortage of finance (Chireshe &

Peresuh in press; Nhundu, 2008; Bharati, 2004; Jegede & Kirkwood, 1994; McIntoch, 1974; Molefi, 1998; Perraton, 1993; Rowntree, 1992; Thorpe, 1988)

Instead, strive for that balance in citations by including a few key works in parenthetical reference and spend time explaining relevant works. For example, you cannot claim “research has shown that structural constraints inhibit expansion of conventional higher education”, and then cite the source and think this would be adequate. Rather spend time discussing a few researches, which support the claim.

?? Academics experience enormous pressure to publish in highly ranked journals in order to secure or protect jobs and gain recognition of peers as a reputable international scholar. The pressure to ‘publish or perish’ may lead to inadvertent or purposeful fraudulent practices, known by scholars as plagiarism.

- a. Define plagiarism and, with the help of three examples, illustrate how these constitute plagiarism.
- b. Identify two strategies for avoiding plagiarism.
- c. What are the possible consequences of plagiarism?
- d. When paraphrasing the work of another person or source, what do you look for in order to avoid unintentional plagiarism?
- e. What is common knowledge, and in what ways does it contribute to plagiarism?

The Structure of a Good Research Article

A research article is a narrative of a defined problem, whose organisational structure takes the shape of an hourglass - flowing from the general to the specific and back to the general. The structure begins with general statements, narrows down to specifics of the current study and then broadens out again to general considerations. A journal article comprises at least five major sections; introduction (including literature review), method, results, discussion and conclusions and recommendations. These may be more if title, abstract, references, etc are included. However, each section addresses a different objective.

According to the structure presented in the diagram below, the introduction uses a general-to-specific movement in its organization; establishing the problem and setting it the literature context, while the methods and results sections are more detailed and specific to the study and provide support for generalizations made in the introduction. On the other hand, the discussion section moves away from the specificity of the study toward an increasingly more general discussion of the subject leading to the conclusions and recommendations, which generalize the conversation once again.

??

- a. Identify three important advantages of attributing the source of your information?

- b. What should you watch out for when referencing your sources?
- c. What are the two main purposes of writing a research article and how do they affect the way you plan and write a research article?
- d. What is the role of brainstorming and who should you involving when brainstorming a research paper?

TITLE & ABSTRACT

Purpose: Provide quick overview of study so readers decide whether to read or not. To be composed after article has been completed.

APA: Title – 10 -12 words; Abstract – Not more than 120 words (2000)

Stand-alone; fully explanatory; accurately captures content of article

Abstract contains:- problem, sample, method, instruments/data gathering procedures findings, conclusions and applications/implications

Purpose: To motivate the study by;

- Introducing investigated prob
- Show importance of study (why study represents addition to knowledge)
- Overview your research strategy

Goal: demonstrate “the logical continuity between previous and present work” (APA, 1994:11)

Purpose: To demonstrate how much ground your research has gained

- Proceeds from specific to general
- Related to theoretical statements made in the introduction section
- Begin discussion by A or B
- Examine findings in relation to previous studies so that ground gained by your study could be seen
- Explain relationships with previous studies and highlight support or disagreements with earlier studies
- Draw inferences from results and describe your logic
- Draw conclusions (only warranted by your study and data)
- Draw implications – theoretical policy making, research, etc
- Don't forget limitations (without compulsively dwelling on flaws)

INTRODUCTION

LITERATURE

PURPOSE/ PROBLEM

METHOD RESULTS

DISCUSSION

- Mirror image of introduction, from specific to general

Goal: Provide study context by looking at what has already been done in your research area.

- Evaluate/critique what is already known of your research problem,
- Analyse r/ships among previous studies,
- Show how this relates to your study,
- Indicate what you hope to show by the study,
 - State any hypotheses, if any (quantitative study)
 - State clear statement of the theme (if qualitative or thematic study)

Method & results represent the neck of the hourglass because they are specific to your study.

METHOD

- Design of study e.g. survey, case study, etc.
- Population, sample (selection procedure)
- Instruments
- Methods of analysis

RESULTS: Forest first, then the trees

- Data analysis
 - Conversion of raw score into analysable data
 - Coding of responses for analysis
 - Combining of observers' ratings
- Address complications, e.g. missing data, outliers, miscoded data, illogical responses,
- Explain any treatment made to your data,
- Provide summary details of findings (not exhaustive list of all possible analyses and data points)
- Use tables, graphs, figures, etc.

BEGINNING A DISCUSSION

- Option One**
 - Highlight key results and go to the problem & summarise (in view of results) what you now think and why,
- Option Two**
 - Summarise what you have learned from the study by explicitly stating the support or non-support of hypotheses or answers to research questions

The Title

The title is usually written at the end after completing writing the body of the paper. The substance of the title and abstract must reflect their main purpose, which is to provide a reader with a concise and accurate overview of the study informative enough for the reader to decide whether they are interested in the article or not.

The title should be a concise and standalone statement written in simple language. It must be factually correct and succinctly captures the central theme, focus, or key variables of the study. While the title should contain the most important words that describe your work, it is impossible to mention all the significant features of the study in a title. However, avoid using titles that are too general in nature because they do not provide interested readers with sufficient information on whether it would be worth their time to consult the study. In addition, since the title is also invariably used for retrieval of most articles from online databases, a title with insufficient information runs the risk of not being found or read because it may not attract the interest of readers.

To keep the title of your paper within the APA word-limit of 10 – 12 words, while fully capturing the focus of the study, it is important to know what to exclude from the title. Avoid including in the title phrases that do not add useful information such as “An investigation of...”, “A study of...” or “A report on...” Instead of “An investigation into the perceptions of head teachers and teachers towards multiple-shift schooling practices in secondary schools”, it would be more appropriate to write “Head teacher and teacher perceptions of multiple-shift schooling practices in secondary schools”

Abstract

Although the abstract is the first section in the paper (the title is not be considered a section), it is the last to be written because it summarizes the paper. The abstract serves a larger purpose than the title. Apart from assisting the reader make a quick decision on whether to read your paper or not, an abstract is a synopsis of the paper which is designed to provide the reader with just enough details to gain insight into the critical elements of the study to determine if your study is related to their interest and whether they should read the rest of the paper more thoroughly. Most journals provide guidelines on the key aspects of the paper that the abstract should capture within the journal’s word-limit.

The recommended APA word-limit of an abstract is 200 words, though this may vary depending on the guidelines of your journal. While the abstract must be brief, it must remain intelligible to the reader because in many cases it may be the only part of your paper that the reader could access and use to decide whether to purchase your paper or not. In a typical empirical study, the main salient features of the study that should be captured in the abstract in logical sequence include the introduction, method, key results, discussion, and principal conclusions. For each key section of the study, the basic information that should be provided in the abstract in one or two sentences includes:

1. **Introduction** – the research question or statement of the problem and main purpose or objectives. This must be stated explicitly so that the reader fully understands the purpose of the study or problem statement or research question.

2. **Method** – describes how the study was conducted, including the sample, key characteristics, data gathering instruments and analytical tools.
3. **Results** – describe major findings, which answer the research question or address the purpose of the research, including statistical significance levels.
4. **Conclusions** – state clearly the major conclusions and implications of the study

To remain within the word limit stipulated by your journal and yet provide sufficient information to cover all the key elements of the study requires practice. A helpful way to begin writing an abstract might require that you go through the various sections of your paper looking for key statements from each section and writing them down as they appear in the paper. That way, you would be assured that, all key elements of your study would appear in the abstract. It is important that the abstract contains something on all the key sections of the paper because each section of a research paper addresses a different objective. The next step would be to rewrite these statements in short, simple, and concise sentences in one or two coherent and intelligible paragraphs, often using simple past tense (passive voice) or past perfect tense.

The table below summarises language styles commonly used for various sections of a research paper.

Section	Purpose	Verb Tense	Key Elements
Title	Captures the reader’s attention and interest	Simple grammar	Simple and short (up to 10 words) Indicates substance and purpose of the study
Abstract	Summarizes (usually in one paragraph) the major aspects of the entire paper. Provides reader with a window to the contents of the paper. Introduces the topic and explains the nature of problem being investigated;	Past (perfect) tense – finished work, e.g. “...it was established that...”	Includes key elements of the research:- Statement of the problem, purpose of the study, method, results and main conclusions
Introduction	Explains importance or need for study; Provides context of work being studied and shows how study relates to and builds on existing research; Indicates focus or purpose of study (in form of hypothesis, problem, question) and research	Present tense for previously published research work, e.g. “...previous studies show that introverts are ...”; Past tense to attribute literature to a specific source(s) e.g. “...concluded that...”	Nature and scope of problem; Critical review of relevant literature; State-of-the-art references and citations; Rationale of study; Research purpose, hypothesis, problem and objectives

	objectives		
Methods	Provides detailed description of the research procedure to allow for replication of the study; Defines target population and research sample	Past tense – refers to how study was conducted, e.g. “...respondents were selected...”	Description of study context and setting; Study design; Target population and sampling strategy; Key study variables and data analysis procedures; Data collection instruments
Results	Presents key findings in an orderly and logical sequence using text, figures, tables, etc.	Past tense; only present tense for results in front of the reader, e.g. ‘Table 3 shows that...’	Key findings; Secondary findings; Tables, graphs, figures and other illustrations; Concise explanations of tables and other illustrations
Discussion	Interpret and evaluates the results Explain discrepancies and unexpected discoveries	Present tense – “...it shows that men are...” Past tense if related to results – “...since rural learners were...”	Discussion of key findings; Importance of findings; How findings relate to previous studies; Consideration of unanswered questions and new questions raised by the study
Conclusion and implications	State conclusions that can be drawn results, in light of the evidence presented State the importance of discoveries/findings	Present tense – focus on what the study has established as knowledge, e.g. “...females are more emotional and tend to express...”	Relate or answer research problem and objectives or hypotheses; Evidence supporting conclusions; Applications and implications to policy, practice and future research

Introduction

Going back to the symbolism of an hourglass, it is clear that the Introduction (including literature) represents the broad part of the hourglass; it is like a an inverted isosceles triangle, with the apex tapering towards the neck of the hourglass, that is, the methodology section. Therefore, the Introduction often begins with a broad or general statement on the topic’s importance, wherein the rationale for the paper is provided and the reader is given to understand why they should bother reading paper.

The Introduction is designed to achieve the following three primary purposes:

- a) Provides a context of the work being reported. This section avoids plunging the reader straight into the formal statement of the problem; instead the reader is introduced to the background of the area and the research problem being investigated. This is accomplished through analysis and discussion of relevant research literature, which sums up current understanding of the problem being investigated and indentifies the gap in the literature;
- b) Presents a brief explanation of the rationale for the study, given the context and what is already known about the topic. The rationale also presents the opportunity for you to identify some outstanding questions that might have remained unanswered from

previous studies and which your study intends to address. Finally, in rationalising your study you must show that what you do in your study is different from what previous researchers have done. If there is nothing new that your research contributes to what is already known of the topic, what justification would there be for your paper to be published?

- c) Explicitly states the main purpose or aim of your research. What is it that your work is going to accomplish? This is often done by cascading the purpose into specific objectives of the study. This could also be expressed in the form of an explicit research question or statement of the problem and arising sub-questions or problems. This section often comes at the end of the Introduction, as you signal issues that are of specific concern to your study.

A brief introduction of the Introduction section usually takes one short paragraph in which the reader is provided with all the information that is essential to establish exactly what your paper is about. The purpose of this paragraph is to overview the Introduction and present how it is organised. In the opening paragraph it is important to use a few key words to identify the area of enquiry in which your study is located. At the same time, briefly state the nature of the problem under investigation and introduce the context.

In introducing the nature of the problem under investigation, use broad statements such as:

“Distance learners who experience competing demands while studying often find it difficult to complete their studies. For example, a distance learner who holds an important civic or political role in the community may be forced to preside over the opening of the local community hall than attend a tutorial...”

This is stated in way that implies or is explicit that there is a specific problem that might require investigating.

Literature Review

After the opening paragraph of the Introduction, the next thing would be to document the current state of knowledge in the area of investigation that the researcher was aware of prior to the study. This is accomplished through a review of relevant scholarly literature. According to the APA (1994:11), the main purpose of a literature review is to demonstrate the “logical continuity between previous and present work” so that the reader appreciates how the current study fits into contemporary research in the area of investigation. Therefore, literature review provides a context for your research by critically evaluating significant previous research that is pertinent to your work.

Many greenhorn researchers find literature review a problematic undertaking because of limited understanding of the nature, scope, and structure of the review. Some think that literature review is simply a summary of previous research to which each of a dozen or so papers receives a paragraph or two of abridged materials. Others may simply catalogue previous research in chronological order, from earlier to later studies, documenting methodological approaches, data and key findings. In addition, the style for this section uses both present and past perfect tenses as indicated in the summary in table 1. Present tense is often used for common or established knowledge

and previously published research work, e.g. "... previous studies show that women in administrative positions are ...", while past tense is used to attribute literature to a specific source(s) e.g. "Daniel (2010) concluded that..."

Literature review is a critical examination of existing research that is significant and relevant your study. In the literature review you are saying, "Look, this is what has been and has not been done previously in this area. Now, see, what my study addresses has not been done and it has potential to contribute to prior knowledge in important ways". To achieve this storyline, you have to carefully select previous research that is relevant to your research problem. Nowadays it is not easy for the young researcher to make wise choice of appropriate literature sources because of the avalanche of available sources, including the internet, Wikipedia, encyclopaedias, textbooks, style manuals, lab manuals, proceedings of professional conferences, etc. Since information contained in many of these sources is often considered 'common knowledge' within the discipline, you should focus more on primary research journals and look for articles that reported specific results pertinent to your study. Primary sources are important because they expose you to the original fieldwork of the researcher or developer of a theory, whereas secondary sources (such as review articles, textbooks, meta-analyses, etc.) take you to the work of others who consulted primary sources; instead use secondary sources to direct you to primary sources. As a rule of thumb, primary sources are preferred to secondary sources; therefore go for primary sources.

There is no prescribed number of references that one should review. A search for literature in a new research area or a topic that is unpopular with researchers may yield very little references. In such cases the literature review may necessarily be short. Otherwise use as many references as possible, provided they are all directly relevant to your study. In addition, give priority to recent articles, to ensure that you have included the latest developments in the area of investigation. Many greenhorns think that loading the literature review section with a lot of references makes them more academic, even if it has little or no relevance to the study. I would rather have a dozen significant references than five dozens tangentially related citations. Nevertheless, using many references is preferable for several reasons. First, it shows the reader that you have made a careful examination of the area of study and have a fuller understanding of contemporary work in the area. Second, a comprehensive understanding of the area of study that is gained through a thorough review of relevant literature strengthens your paper in the eyes of the reviewer because it demonstrates that you have a better grasp of the context of your study and how it relates to previous research. Finally, the more references you have, the greater the chance that you might end up citing some of the people who would review your paper because reviewers are selected for their expertise in the area of your study. Although this is not a sufficient condition for your paper to be published, it would certainly create a warm reception in the reviewer.

Moving to the structure of literature review, three things stand out. Literature review should first discuss in simple language, any significant concepts and sub-concepts by defining them in your own voice and using original examples to illustrate and explain them. Next, you should critically discuss relevant previous studies, focusing on variables investigated and methodologies used in these studies and establishing relationships among different studies. If all these studies are relevant to your study,

then it logically follows that they are also related among themselves. Apart from exploring relationship among previous studies, you should also pay particular attention to methodological problems and shortcomings associated with these studies and identify how and where your work comes in relation to these gaps and weaknesses. Such an approach to literature review prevents you from providing the reader with a simple abridged synopsis or concise description of selected previous studies; instead it helps the reader gain a clearer understanding of the importance and potential contribution of your study relative to previous research. This is a way of justifying your study and serves as a lead up to or entry point for the last part of the literature review in which you clearly state the purpose and objectives of the study and/or the hypotheses that you investigated.

Finally, it is always helpful to go through your literature to determine whether your review of the literature has fully achieved the purpose of literature review. The following list serves as a guide to verify that the literature review has addressed all important aspects of the review and that all that needed achieving has been covered. You need to ask yourself whether the literature review has adequately dealt with the following;

1. All key concepts, sub-concepts, factors, and variables are clearly defined and explained;
2. Significant theories of the phenomenon under investigation have received adequate attention;
3. What is known about the research area has been comprehensively covered, including identification and exploration of relationships between previous studies in terms of important concepts, factors, variables and key findings;
4. Due attention has been given to methodological problems, inconsistencies, shortcomings, and knowledge gaps of previous studies have been identified
5. Rationale for further research has been adequately demonstrated to justify your study;
6. The purpose and objectives or hypotheses of the present study are explicitly stated.

Research Method

The methodology and results sections represent the neck of the hourglass because they are most specific to the study. The purpose of the methodology section is to provide a precise description of how the research was conducted so that a reader is able to replicate the study using a different sample. The main elements of the methodology section, comprising study design, population, sample, data collection instruments and procedures and data analysis methods, provide the methods section with a general structure that reflects the logical flow of the study and allows the methodology section to be organised into subheadings.

The design subsection first identifies whether the study carried out was a survey, case study, meta-analysis, controlled experiment, or some other type of research. Second, there must be justification for the preferred design and its appropriateness, given the nature of the investigation. It is in this subsection that the major qualities of the preferred design that make it the most appropriate approach for the research are explained in sufficient detail to convince the reader of its appropriateness.

The sample must be described with great accuracy and sufficient details and make clear the population represented by the sample. It is important to explain whether one is dealing with a homogeneous sample or whether it comprises distinct subgroups. Explicit sample selection procedures do not only assist in determining whether the sample is representative of the population, they are critical for replicability of the study. Sampling procedures used, such as randomisation, stratification, etc., must be explained and the purpose for which they serve in the study must be made clear. Even where sampling methods that might appear less rigorous were used, such as convenient samples, these should be clearly explained and justified.

The next subheading contains information on data collection instruments used in the study. The choice of instruments used in the study should be explained. All the instruments used, including structured and unstructured questionnaires, interview forms, tests, and any other tools used to collect data, should appear under this subheading. In addition, evidence of reliability and validity should also be provided. The instruments must be described and sample items included under this subsection, while the actual instruments would appear as appendices. The main purpose of all this is to provide the reader with a feel of the instruments in order to allow for possibilities of replication. This subsection also contains detailed descriptions of procedures adopted to collect data. For example, it is important to explain whether the questionnaires (where they were used) were mailed or hand-delivered and, likewise, provide the reader with the rate of return and its implications for the results. Similarly, confidentiality and ethical issues should be addressed so that it is clear how the anonymity of respondents was protected and if their participation in the study was voluntary and informed.

The last subsection on data analysis describes how data concerning various research variables was handled. In a qualitative study, detailed qualitative analyses procedures of how the data was handled (usually thematically) are provided, while statistical procedures used to analyse dependent and independent variables and other data and determine levels of significance in quantitative studies are provided and justified. Finally, be honest and provide a small section where you acknowledge and briefly describe the limitations to your study. This is something that you should not shy away from thinking that it exposes flaws and weaknesses in your study, rather it provides you the opportunity to demonstrate to the reader that you know best practices and how to strengthen your study and, hence, what could have been done to make your study optimal.

Finally, the style used in the methodology section should be expressed in simple past tense because it refers to work that was completed. The work being reported was undertaken and completed. This section also often uses passive voice more often than not.

Results

The purpose of the Results section is to present your results with objectivity, clarity and precision and in a logical structure. In addition, the Results section may be combined with the Discussion section, especially when it is a short paper. However, how you present the results also depends on whether your study is a quantitative or qualitative and your journal's expectations. If you are reporting on the results of a

qualitative study, the results section reports of the main themes that emerged from interviews, observations, documents and audio-visual materials. Presentation of results of a quantitative research, on the other hand, is much more systematic and economical because illustrative materials (including tables, charts, graphs, etc.) are used to organise data. In a quantitative research, the Results section could be conveniently organised around these illustrative materials, which are then systematically sequenced to provide a logical flow of the research findings.

Whether the study is quantitative or qualitative, the Results section is purely factual in nature in that it presents the findings as they happened or came out from the study. The findings are reported in simple past tense and often using the passive voice construction. For example, “The majority of female learners (67%) were single parents aged 23-55 years. This group was also...” Simple present tense is also used, especially when describing illustrative materials; e.g. “Table 1 shows that, unlike married learners, single parents were...”

Although there may be many ways of organising the structure of the Results section, a logical way to begin the Results section is to provide a brief explanation of data analysis procedures. This enables the reader to understand and appreciate strengths and shortcomings of how data was handled. The main focus for this preliminary consideration includes;

1. Provide a brief description and explanation of all protocols and protocol violations in a way that addresses the following questions;
 - a. What method(s) were used to convert raw scores or observations into analysable data?
 - b. How were questionnaire responses coded for analysis?
 - c. What procedures were used to combine respondents’ ratings for data analysis?
 - d. How were measures converted into standard scores and why?
2. Describe any data anomalies and explanation of how it was treated, including outliers, miscoded data and illogical responses,
3. Describe statistical analyses techniques used and their suitability. If you used unconventional or less familiar data analysis techniques, there would be need to explain in greater detail and cite approach references, than would be the case if standard techniques, such as ANOVA, correlation analyses, T-test, etc, were used,
4. Show that you understand the statistical techniques you are using in analysing your data. With the availability of sophisticated statistical packages, such as SPSS, it is possible to use very complicated techniques that the researcher knows very little of, whereas simple statistics could have been used to greater effect,

When reporting your results, refrain from using raw data values because they are inferior to statistical information (such as means, percents, etc) when it comes to conveying information. Where statistical tests are used to analyse data, the standard convention is to present descriptive statistics first followed by more advanced statistical tests. Therefore, where inferential statistics are used, the practice is to determine the power a priori based on anticipated distribution, design, and definition of practical significance. The standard convention is to report first the statistic used, following by the number of degrees of freedom (df), the computed value of the statistic and, finally, the probability of obtaining the computed value of the statistic by chance. For example, where ANOVA was used within the convention of the APA

Guidelines, you could report that “There was a significant difference in the performance of distance learners when classified according their regional centres [$F(2, 43) = 4.91, p < 0.05$.], whereas the results for a T-test analysis could be reported that “Females performed significantly better than males [$t(24) 2.55, p < 0.05$].

Illustrative materials, such as tables, graphs and figures, are important means of presenting quantitative results and even organising qualitative information in form of prose tables. They should be numbered using Arabic numerals and beginning with number 1, e.g. Table 1, Figure 1, Graph 1, etc. However, there are specific principles that should be observed when creating illustrative materials and organising information contained in tables, graphs and charts. The following list provides some guiding principles of when and how to include illustrative materials in the Results section;

- use tables, figures and graphs sparingly;
- avoid redundancy by presenting the same data in both a table and graph or other illustrative material; this is a waste of space and energy since it does not add value to the data – choose and use only one format which best expresses the result;
- use illustrative materials where a set of results is important but cannot be expressed in one or two numbers;
- use tables, graphs and figures only when they will illuminate the results and enlighten readers better rather than prose;
- the contents of illustrative materials must be self-explanatory;
- include only illustrative materials that are discussed in the paper;
- illustrative materials must be appropriately titled in a descriptive way that accurately captures its contents, even if it means constructing a lengthy heading

In the accompanying explanation always refer to the illustrative material by number and explain explicitly what you are referring to. However, when explaining a table, graph or figure, the strategy is to literally lead the reader by the hand through the contents of a table and point out the results of interest. For example, “Column 1 of Table 1, which presents rank-ordered preferences of learners, shows that the most...” It is important to navigate the reader through illustrative materials, making sure that all areas of interest are illuminated.

According to Bem (2003), the general rule when presenting results is to “give the ‘forest’ first and then the trees”. This is a structured and systematic way of presenting results in a logical sequence, where you frame your presentation of the results around the main research problem, purpose or hypothesis, before moving to additional evidence that addresses corresponding sub-problems, objectives or sub-hypotheses. With this approach, you deliberately begin with the primary findings, which are at the core of your study, before proceeding to secondary findings. Since the secondary findings are peripheral to primary findings and only serve to qualify or elaborate the former, they should be presented as ancillary evidence supporting or challenging the research problem, purpose or hypothesis. Therefore, do not give pre-eminence to secondary findings when presenting the results nor try to present every minor or peripheral finding of your study. In fact, a mistake that many young researchers make is to try and include every detail and finding of their studies.

Discussion

After the Introduction (including the Literature Review), the Discussion section is the second most important part of a research paper. Just as the Introduction convinced the reader why they should bother reading the paper, the Discussion section demonstrates to the reader the contribution that your study has made to the research area. It is also potentially the most difficult part of the paper because, depending on how you develop the discussion of your results, it could either make the study pay off handsomely or it could turn out to be a disaster and weakest part of the paper. This section may also be presented by integrating it with the Results section. While the advantage of such an approach is that it allows the discussion to be conducted within the immediate context of the results that generate the discussion, the disadvantage is that illustrative materials, such as tables, charts, figures, etc., interrupt the flow of the discussion. However, whether the two sections are presented separately or combined, the main purpose of the discussion section is to interpret, evaluate, and explain the meaning of the results to the reader and highlight the significance of the findings and support all conclusions reached.

The Discussion section is the mirror image of the Literature Review and represents a triangle, where the discussion of results proceeds from the apex that deals with matters more specific to the study and proceeds to the base where broad generalisations on theoretical, practical and policy implications are discussed and presented. This triangular structure also corresponds with the hourglass-format, in which the structure of the Discussion section gradually proceeds from the narrow middle part that addresses matters more specific to the study to more general issues at the bottom of the hourglass. However, the Discussion section should be organised such that it directly relates to the main research hypothesis, purpose or problem statement and attendant sub-problems and objectives.

While the ultimate shape of the Discussion section depends on the experience of the author and the stylistic requirements of the journal, an overriding consideration is that the structure of this section should allow for a logical flow of the issues discussed. However, though there is no standard structure of the Discussion section, key elements that appear in Table 2 that should be included in an informative discussion enhance the logical flow of the discussion and also instrumental in guiding and ultimately influencing the shape of the Discussion section. Table 2 also juxtaposes things that should not be included in the Discussion section.

Table 2: Things to consider when writing a discussion

Key Elements to include in a Discussion	Things not to Include in a Discussion
Highlights of significant findings of the study	Proliferation of results

Interpretation and importance of the results	Over-interpretation and inflation of importance of results
Discussion of key results in relation to previous research	Peripheral issues or findings
Consider alternative explanations of key results	Unjustifiable speculation
Discuss implications for theory, policy and practice	Unsubstantiated conclusions and new findings
Analyse the strengths and limitations of the study	Dwelling compulsively on shortcomings
Identify scope for further research	Grandiose speculation and exit

It is advisable to commence the Discussion section by presenting a summary of the key results of your study, in a paragraph or two, before you make in-depth interpretation and evaluation of the results. It is important to select key findings and discuss them well than to populate your discussion with a proliferation of results. Attempting to discuss each and every finding is a common mistake that writers often make (Bem, 2004). Therefore, if you have many findings, consider writing multiple papers in order to avoid over-presentation of results.

Meanwhile, it advisable to begin the Discussion by telling the reader what you have learned from the study because it forces readers to remind themselves of the purpose of the study and to focus on it. However, the idea is not to simply transfer statements of key findings from the Results section, but to make a clear declarative and conclusive statement of how the hypotheses or the research problem and sub-problems that were raised earlier at the end of the Literature Review section are being supported or not supported by the findings. Thus, you take your reader to the statement of the problem and authoritatively tell them know what your results say about it. For example, if the results confirm the original research problem, question or hypotheses, you may say that “The results of this study confirm that female administrators are...” or if there is no support, you might say “However, the results of this study are inconclusive regarding ...”.

This is your time to talk authoritatively about the results of the study because at this point there is no one who has as much intimate knowledge of the study and, therefore, more qualified to speak confidently of the results as you do. Since you did not only conceive the study and conducted it, but you also had more time than anyone to consider the results, the meaning and importance of the results must be more apparent for you to demonstrate to the reader your grasp of the results. Therefore, your task is to share with the reader your understanding of the results and their importance. Ensure that each statement you make has a purpose, to contribute something new to the reader’s understanding of the research problem. In highlighting the importance of your study, do appear like a marketing person or to be haughty or patronizing. However, if the reader fails gain something from your discussion of the results, it means you have probably failed to convince the reader that your study is worth publishing.

Reference to previous studies is not written as a separate section, but is integrated into the analysis as a way of acknowledging that your study builds on prior knowledge in the area of research. Even if your study is unique, you are still likely to find that it has some relation with previously published work, provided you undertake a thorough search of the literature. The value of previous studies is to assist in interpreting the results of your study and also to show similarities or differences with previous findings. Therefore, the findings of previous studies may either support your findings and strengthen the significance of your study, or contradict and provide a new perspective to understanding the research area. In addition, the findings of previous studies could also be combined with your results to provide reader with a better understanding of the research problem. However, whatever value previous studies contribute to the interpretation of your results, you should always provide explanations and reasons for why your results are similar, different or have to combine with previous findings. Apart from similarities and differences with previous findings, you also should carefully consider key (maybe not all) possible explanations of your results.

The discussion section also offers the researcher the opportunity to explain the implications of the research findings and share them with the reader. Since in research there are several types of research implications, including study designs, data analytic approaches, theory, understudied or new research areas and methodology (Drotar, 2008) and policy issues, it is important that the researcher closely considers the implications of the study. However, you should neither overstate the implications of your study nor should you make assertions that you that you cannot support or prove. It is better to be modest about the implications of your study than to be ostentatious and exposed your article to negative review and rejection by the editor.

Just as the findings of every primary study have implications, all studies have limitations. Even articles that appear in the most prestigious journals have limitations that readers should be made aware because they need to consider them when interpreting your findings. For this reason, it is better for you to identify and address the limitations of your study than to have them pointed out by a peer reviewer. Unfortunately, if you do not openly discuss the limitations, the reviewer may think that you were not aware of the limitations of your and their implications to the interpretation of the results. However, just as you should carefully consider the implications of the findings and avoid writing about every implication, you should also be selective and focus on only the major shortcomings or most salient limitations (those that pose the greatest threats to internal or external validity) of your study, including conditions that might compromise or limit the generalizability of the findings, but avoid dwelling compulsively on shortcomings.

Writing a conclusion is the last, but important, part of a research article. You should not allow the reader to come to the end of your paper without realising that the paper has ended. A poor conclusion is like a poor ending to a beautiful song, which annoys the listener because of sudden ending or dancing long after it has ended because they are unaware the song has ended. To the reader the conclusion is like what the final chord in a song is to the listener. As the final chord in the song plays, the listener should be made to feel that the piece is not only complete, but well done and worth listening. The conclusion provides the opportunity for you to have the last word your

research problem and not research field. The conclusion could leave a good final impression in the reader or a sour taste in the mouth.

Whereas in the introduction you navigated from the general (research area) to the specific (research problem), in the conclusion you move from the specific (research problem) back to general (area of study or how the research will affect the world). Therefore, the conclusion allows you to go beyond the confines of the assignment and explore broader issues that may lie outside the confines of the current researcher. However, this does not mean that you introduce new information that has not been mentioned in the results section. Instead, you should draw important conclusions from what has already been stated in the results and discussion. It is not uncommon for a research paper to conclude a paper by describing the current state of knowledge in the field of study and then offer suggestions for future research. However, your conclusions should be warranted by your study and your data, even when you end with a broad statement that lies outside the confines of the research problem.

ACTIVITY: Complete columns 3, 4 and 5 below annotatively by providing critical detailed information				
Section	Key Question	Purpose	Verb Tense	Key Contents
Title	What is the name of the paper?			
Abstract	What did I do in synoptically?			
Introduction	What is the problem? What is state of knowledge?			
Methods	How did I solve the problem?			
Results	What are my key findings?			
Discussion	What do the findings mean?			
Conclusion and Recommendations	How do I tie up the findings?			
References	Whose work did I consult?			
Appendices	Any additional relevant information?			

Selected Common Mistakes in Writing Research Article

This section looks at selected common mistakes made by many inexperienced and some experienced writers of research articles. As a result, a research article that might have a good structure may still put off the reader or might even be irritating due to common mistakes, which include poor style, grammar, spelling, sentence construction and redundancies. Other common mistakes may relate to specific aspects of various sections of the paper, such as introduction, methods, results, discussion, etc. It is important to share my experience in reviewing and editing manuscripts and others cited in the literature concerning common mistakes made in manuscripts submitted by writers, especially beginning writers.

Perhaps the most common mistake made by many inexperienced writers is the tendency to write very long and convoluted sentences that may qualify for two or even more separate sentences. Still many others are in the habit of writing one- or two-sentence paragraphs. Concise and simple sentences minimize unnecessary grammatical mistakes and are easily understood by a wider and varied readership, including speakers of English as a second or third language. Therefore, avoid sentences with one or more ideas linked by conjunctions, such as “and”, “yet” or “but”, or that are separated with a semicolon. Instead, separate them into two independent sentences, which are complete, simple and concise.

A sentence should not contain unnecessary or superfluous words because they camouflage the writer’s meaning and purpose and may be misunderstood by the reader. Similarly, a paragraph should not contain unnecessary or superfluous sentences; instead it should be deliberate, with a well-organised logical flow. According to Gray (2003), a paragraph should have a key idea, one key sentence, supporting sentences and a concluding sentence. The key sentence succinctly captures the idea or purpose of the paragraph, while supporting sentences develop the idea further as needed. The final sentence, on the other hand, should conclude or sum up the key idea in view of supporting sentences. A concluding sentence, which ties up the paragraph, could be constructed readily by using conjunctive adverbs, including ‘therefore’, ‘consequently’, ‘thus’, ‘accordingly’, ‘hence’, and ‘however’. Therefore, any sentence that introduces information that may be peripheral or not directly linked to the idea or purpose of the paragraph should be omitted.

One of the most common forms of redundancies made by authors involves the use of the following phrases;

- “one and the same...”
- “advance planning...”
- “join together...”
- “true facts...”
- “explicitly clear...”
- “examples such as...”
- “estimated at about...”
- “at the present time...”
- “the reason is because...”

Presenting the same data in both Table and Figure format is redundant, irritating, and a waste of space; instead you should decide the format that is best for presenting the results and use it. Finally, another redundancy occurs when presenting results in the form of a table or figure. The text that accompanies a figure or table should complement and not repeat the same information in the figures and tables.

Avoid data tables that flow across more than one page. Depending on the journal, you may be required to type them on separate pages, insert them in the text as each is mentioned, or at the end of the paper. However, new researchers often find it difficult to label tables. The heading of the table or figure must capture explicitly what the table or figure is about. In addition, each table must be sequentially numbered and the rows and columns must also be explicitly labelled. It is also preferable to present data in statistical form, such as means, percents, etc, instead of raw data values. Finally, limit the use of the word 'significant' to cases where a statistical analysis has been performed and the difference observed is not attributable to chance, but to some intervention. Where significant differences are observed, the appropriate statistic must be cited accordingly. In addition, by opting for basic statistics, many new researchers erroneously prefer familiarity over relevance, when they shy away from using robust statistics that are more informative.

A final common mistake made by many beginning researchers is failure to revise the manuscript. Revision of a research paper is an essential step in scholarly writing, yet many new writers often forget to revise and edit their manuscripts. As you revise your paper, be your own critic and be prepared to rework and make appropriate changes to your paper. In addition, use colleagues and experienced researchers to solicit feedback on your paper, concerning content, structure and clarity in the presentation of your ideas. A paper that has not been edited often has spelling mistakes, incorrect entries in tables, poor grammar, lacks flow in the prose and is devoid of logical flow and coherence.

??

1. Discuss why the following should be avoided when writing the discussion section of a research paper.
 - a. Over-interpretation of the Results
 - b. Unwarranted and grandiose speculation
 - c. Inflating the importance of the Findings
 - d. Tangential issues or findings
 - e. Conclusions that are not supported by the Data
 - f. Dwelling compulsively on shortcomings
2. What literature should you look for in your review of what is already known about the problem being investigated? (Issues to consider when answering this question include *primary literature, currency of sources, review articles and citation index*)
3. Why is information contained in general background references, such as textbooks, style manuals, encyclopaedias, lab manuals, etc.), considered fundamental or 'common knowledge' within a discipline and, hence, should never be allowed to take precedence over research articles that report findings that are relevant and specific to your study?
4. The discussion section is considered the high impact section of a research paper because

- a. It connects the findings to the Introduction or what is already known of the subject of investigation [True/False]
 - b. It gives the researcher the most freedom to tout the implications of the research findings [True/False]
 - c. It interprets the results to reach the main conclusions of the study [True/False]
 - d. It provides opportunity to demonstrate what is new and significant contribution the study has made to what is already known [True/False]
- [Please support your choices]
5. Organise in order of perceived gravity some of the mistakes that are frequently made by beginning researchers and justify your priority order;
 - a. Failure to make clear to the reader and editor the *original* contribution of your research
 - b. Submit the same manuscript to more than one journal
 - c. Failure to distinguish significant and non-significant results and, hence, giving excessive weight to non-significant findings
 - d. Failure to paraphrase using your own original words, resulting in unintended plagiarism
 - e. Writing long and convoluted sentences

Challenges

A few challenges have been noted in the situation about ODL research and journal articles in Southern Africa (cf. Tichapondwa, 2010). These include:

- The majority of articles are focused on a narrow base, namely, learner support issues. Areas such as economics of DE, staff development, and research and scholarship do not seem to be receiving attention.
- Most of the articles remain overwhelmingly descriptive and narrowly focused on institutional ways of doing things. They seem to be wanting in cross-cultural analysis.
- A weak methodological footing has been noted as a trend in the articles.
- Some articles tell nothing new, reporting what is done in a given institution, using crudely developed instruments.
- In a number of articles there seems to be little evidence of critical analysis and judgment.
- There seems to be a scarcity of experimental research studies, since the majority of articles are inclined towards case studies.
- Although there is ample evidence of increasing interest in writing articles, it appears there is a challenge of lack of training in how to write articles.
- Quite a number of articles have been discovered to be having a poor theoretical grounding.

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Distance Education Research and Scholarship in Southern Africa

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Some Questions

1. What is the structure of distance education research?
2. What methodologies are evident in the journal articles?
3. What is the quality of current research?
4. What gaps can be identified in the current research?
5. What are some of the theoretical ideas associated with ODL research?
6. What evidence is there about areas of research priority?
7. What areas of ODL research do the current studies mainly focus on?
8. What challenges are faced in promoting research and scholarship in ODL?
9. What are the characteristics of ordinariness hypothesis?

Introduction

A gap still exists in the literature as well as in practice regarding the status of open and distance learning as a discipline in both Southern Africa and internationally. Some of the ideas shared in this chapter derive from an article on the subject, which was published in 2010 (cf. Tichapondwa, 2010). The ODL practitioner will require guidance on how research, as a demonstration of scholarship in ODL ought to be progressed. This is in the interest of making ODL sustainable. One of the questions the practitioner is expected to answer is: What is research? Before reading ahead cite your personal definition in the space provided.

?? I define research as

Many writers have defined research, and presently I give a personal definition that attempts to synthesize several definitions. Compare it with the one you gave.

Research involves the identification of a problem, collection of evidence, analysis and diagnosis, interpretation using theory, and communicating findings to audiences outside the researcher's context.

On the basis of this fundamental definition, this Chapter seeks to establish the state of research and scholarship in ODL our region. There is widespread evidence that research in the field of education, in general, has been going on for decades, but not so in distance education.

The starting point for the practitioner is to recognize that the field is characterised by non-conformist and non-traditional approaches, which in effect, question the existing norms of traditional education and seek to provide a new orientation to educational processes. This perception captured in the various definitions of the discipline (cf. Wedermeyer, 1977; Moore, 1973; Peters, 1971; Holmberg, 1981), where distinguishing features such as self-study, team approach, transactional distance, and the centrality of media are explained.

The point made by Evans (2000:2) should not be taken lightly. He observes that single-mode universities need to undertake significant research activities, otherwise they may be considered inferior to conventional universities on which they usually depend. To extend the argument further, whether a research discipline of distance education as noted by Holmberg (1987) has emerged or not, it is imperative that all activities and practices within distance education should have a sound empirical base through research (Moore, 1988; Jegede, 1991). Additionally, practitioners are encouraged to engage in needs assessment for DE research (cf. <http://carbon.cudenver.edu-Lsherry/pubs/issues.html> 2010). On the basis of this understanding, the state of research and scholarship in DE is explored with the objective of raising practitioner awareness of what happens on the ground.

?? What is your understanding of a single mode institution?

A distinction is often made between an institution that offers courses using both face-to-face and distance learning modes. This would be referred to as a dual mode institution. An institution that offers courses through one mode is then known as single mode. Can you cite examples of these two types of institution?

The problem

The present chapter was motivated by the perceived problem that there does not seem to be a systematic approach to research in ODL in the SADC countries, and if there is any research evidence, the practitioner needs to be informed about the state and quality of such research. A gap has been perceived by the author about the knowledge possessed by scholars and practitioners alike relative to the status of DE research in Southern Africa. This is notwithstanding the fact that DE is gradually, but steadily, gaining legitimacy as a discipline in its own right (cf. Keegan, 1990; Holmberg, 1996). Elsewhere, scholars (e.g. Mishra, 1998; Calvert, 1995) have conducted studies into methodological issues and priority areas for DE research. On the other hand, the Horizon Report (2009) encourages research in dialogue about the potential of collaborative learning and creative applications of emerging technologies. However, comparable studies on the same subject in Southern Africa seem to be scarce, hence the justification for the present chapter. Now, respond to the following activity before reading on.

**?? a. What evidence of DE research are you aware of in the sub region?
b. Is this the type of research you would expect as a practitioner?
c. What gaps have you perceived in the corpus of research that is available?**

Your response will be a useful starting point as you reflect on the status of research and the available literature. Share that with fellow practitioners, then as you read what follows estimate the extent to which what you raised agrees or differs with suggested ideas.

In an article on trends in ODL research, Tichapondwa (2010) has summarized the state of research in the sub region. He notes that published research in open and distance learning is somewhat scarce in Southern Africa. *Progressio*, the South African journal for Open and Distance Learning Practice, and the newly launched (2007) *DEASA-SADC CDE International Journal of Open and Distance Learning* are two instances of concrete research evidence. He also notes that since 2000 there has been increased interest in ODL issues in the region, and the Distance Education Association for Southern Africa (DEASA) organises a conference every year to promote research. Unfortunately, not all conference papers are research papers. Most are concept papers that merely give information about institutional practices. On the other hand, undergraduate and post-graduate research studies are commonly carried out, but these are not readily available for analysis. It is also acknowledged that there are some articles published by Southern African scholars in other international journals, but quantities and the quality of these are yet to be established.

Some key ideas about research

The practitioner will need to base his/her understanding of research and scholarship on what I call fundamental ideas about research. These will be discussed briefly, but to share your perceptions, work on this activity.

- ?? a. What do you think are some of the basic ideas about research that you need to know as an ODL practitioner?**
b. How are your ideas applicable to DE practice?

The response is personal, but should be supported with logic before reinforcing it with some of the ideas discussed below.

The review of literature on research trends is anchored on the fact that distance education fulfils the functions of an educational system, namely, that it has a significant social and cognitive function (cf. Koul, 2000:51). It fulfils these four aims that characterise the functioning of an educational system: giving instruction in skills; building a cultivated society; advancing learning; and transmitting knowledge in its various manifestations. Any research should, therefore, be undertaken with these characteristics in mind.

Scholars, however, have drawn attention to some of the barriers to distance education research. For example, Berge, Muilenburg, and Haneghan (2002) note that barriers are greater at the initial stages of an organization. This is mainly because there will not be clear systems of scholarship in place, apart from other constraints like funding and lack of expertise. In trying to overcome barriers in training and research, Cho and Berge (2002) advise that although there are many barriers to overcome, consideration of barriers faced by other organisations may help leaders find solutions to reduce or minimise obstacles in their own institutions.

Research in DE ought to be systematic and whatever the approach used, it should also culminate in the development of a cohesive theory. In the words of Keegan (1990:5), “a theoretical basis would replace the ad-hoc way of responding to crisis situations which normally characterise this field of education”. Succinctly defined, a theory “is simply an organisational statement of what is known, a map of the field” (Moore,1985:51). A particular theory gives practitioners a guide for practice and summarises what has been discovered in a given area of speculation. Jeffries (2009) has demonstrated that research has either generated theories about distance education, or has utilized such theories to feedback into distance education praxis.

Evans and Jakupc (1996) have divided DE research into three broad areas, namely, the structure of DE research literature, methodological issues, and areas of research priority. This theoretical guide would serve as foundation for a better understanding of the corpus of research literature in the region.

Researchers have also come up with theories about areas of priority in DE research. For example, Sherry (cited in Berge and Mrozowski 2004:2-4) came up with these categories:

- Design issues
- Redefining roles of key participants
- Strategies to increase interactivity and active learning
- Learner support
- Operational issues
- Policy and management issues
- Equity and accessibility
- Cost/benefit trade-offs
- Technology selection and adoption

Tichapondwa and Tau (2009) have come up with the following areas for research in the context of Southern Africa, following research in Botswana, Zimbabwe, and South Africa.

- Definition of distance education
- Open and distance learning in new environments
- Managing the distance education system
- Open and distance learning study materials
- Learner Support in DE
- Communication issues in DE
- Challenges and the future of DE

Gupta and Renu Arun (1986) and Panda (1992), in their analysis of DE in India gave an equally comprehensive list of categories in the field. Calvert (1986) also provided a conceptual framework for DE research in his discussion of the Canadian progress in systematic DE research. The rigour of research in any discipline is accounted for by the methodologies used.

- ?? a. What research methodologies are you familiar with?
b. Which of these methodologies have you used before?
c. What strengths and weaknesses have you identified in each of these?

Phipps and Merisotis (1999) theorise about four methodologies, and these are:

- a) Descriptive research, defined as the collection of data through observation, questionnaires, attitude scales and interviews.
 - b) Case study research, which involves a detailed investigation of one or more instances of a phenomenon.
 - c) Correlational research, described as the collection of data in order to determine whether a relationship exists between two or more quantifiable variables.
 - d) Experimental research, which tests hypotheses concerning cause and effect.
- A fifth one proposed by Naidu (2004) is added, namely:
- e) Evaluation study, concerned with systematic acquisition of feedback on the use, worth, and impact of some object in relation to its intended outcome.

In the review of research literature, it struck me that a new area of research priority, additional to categories by Sherry, is emerging. It is referred to as research about research, which is a category of priority areas. This is an interesting phenomenon because preoccupation with research about research addresses core issues of DE as a discipline. In particular the practice seeks answers to the central question: Why research in DE? This is, incidentally, the focus of the present chapter.

Sir John Daniel (2002) has identified three reasons for researching DE learning, namely, evidence, expectations and environmental considerations, and these are examined in some detail.

Evidence refers to the information gathered as a result of personal commitment and the academic mode of thinking. By undertaking a study, the researcher gains more evidence and forms hypotheses that increase knowledge about DE. Regarding expectations, societies have come to expect that DE can bring about radical changes to the face of education and create opportunities for mobility in situations where conventional education systems have failed to do so (cf. Tichapondwa, 2008). Researchers, therefore, have a duty to inform whether such expectations are grounded in reality. Thirdly, the environment in which DE is introduced is an important concern for research. For a start, it might be a new environment as well as a changing one that is replete with challenges (Tichapondwa and Tau, 2009). In such an environment, conventional classroom education has held sway over DE for centuries and has become comparatively more stable, while DE is regarded as inchoate. The three reasons for research are, therefore, fulfilled through the conduct of research in discourse that is unique, esoteric and peculiar to DE.

My final observation on ideas about research is concerned with the application of DE research findings in environments different from but comparable to the one in which the study was originally conducted. Cookson (2002:152) is of the opinion that distance education research practices that emerge in one country may not necessarily successfully transfer to other national and cultural contexts. He goes on to state that:

“despite that premise, my assumption is that if we focus on the principles that underlie specific practices, specific innovations originating in one national and cultural context may more likely be adapted to fit other national and cultural contexts”.

For a research study to suit national and cultural contexts, the age-old issues of reliability and validity will always remain critical criteria for assessing the structure and methodological rigour of research studies.

A conclusion, for the benefit of the practitioner can be drawn from the foregoing theoretical perspectives, that if open and distance learning (ODL) institutions are to increase shared knowledge and praxis in the field, they will only be as effective as their academics enact a genuine commitment to research. Such a commitment can be forged and reinforced by a concerted programme of enquiry and a quest for increased quality in the discipline that has come to be known as Distance Education.

Evidence-based data

This chapter is based on evidence collected from research articles from two distance education journals in Southern Africa. My main aim was to establish these areas: sampling, the structure and priority areas; the methodologies evident in the articles; and qualitative testing for the rigour of articles.

Data were collected from a sample of 34 articles from *Progressio*, and 33 from the *International Journal of Open and Distance Learning*. These were analysed using pre-specified categories as the analytical framework. In brief, the criteria were that each article be published between 2000 and 2009, and that it should include a description of the methodology used in conducting the research reported in the article.

To establish areas of research priority, the nine areas proposed by Panda (1992) were used. Additionally, a tenth category, research and scholarship, was suggested in keeping with trends in international research. The ten pre-specified categories are:

1. Concept, growth and development.
2. Curriculum/course planning and development
3. Instruction/ teaching
4. Media and technology
5. Learners and learning
6. Institutional policy and management
7. Economics of distance education
8. Evaluation of a phenomenon
9. Staff development
10. Research and scholarship

The last mentioned area has become an important and regular aspect of study in distance education research (see Berge and Mrozowski, 2004). Together with the nine

areas proposed by Panda, the typology was used to adjudicate the categories of the sampled articles. A determination of the areas attracting most attention, and those attracting the least was made, supported with evaluative comments. To test for the types of research methodologies used, the typology proposed by Phipps and Merisotis (1999:12) was applied. The scholars proposed four types, while I proposed a fifth one, evaluation studies. Each type has a clear definition of what it purports to cover. This is followed by a characterization of its positive and negative features. The features combine ideas by Naidu (2004) with some of my own. This is done with the aim of qualifying each study type. It is these features that would lift the study from a mere description of research types to the crucial evaluation of the rigour identifiable in the 67 research articles sampled for analysis. These pre-specified notions (method types and characteristics of individual methods) are presently summarised.

Table 1. Types of research methodology

Category	Positive features	Negative features
Descriptive: collection and reporting of data on organizations, programmes and processes.	Comprises valid and reliable data; reveals trends; innovative and charts new directions; contributes to what is already known; has validated measurement tools.	Tells nothing new; simply reports what was done and why; boring; nothing creative or ambitious about the description; crudely developed instruments.
Case Study: in-depth study of one project, or one subject, presented in narrative form.	Has a character, totality and a clear boundary; reflects some unity in the phenomenon being reported; seeks patterns, and commonality in the study.	Narrates a story; does not go beyond dry description; boring; not innovative; no critical analysis; crudely developed instruments.
Correlation: involves collecting data to determine whether, and to what extent a relationship exists between two or more variables.	Reveals a clear relationship; provides an estimation of how related the two variables are.	Mainly descriptive and narrative; data collected using crudely developed instruments.
Experimental: tests hypothesis concerning cause and effect of one variable on another.	Manipulates the independent variable to determine its effect on the dependent variable; subjects are assigned to experimental and control groups; systematic selection of subjects to eliminate bias.	Use of crudely developed instruments; poor control; descriptive presentation.
Evaluation: studies the systematic acquisition	Aims at influencing decision-making; can be	Narrates or describes phenomena; little

of feedback on the use, worth, and impact of some object in relation to intended outcome.	formative, summative, or monitoring evaluation; studies the impact and outcomes of processes designed to contribute to the solution of a problem	evidence of critical analysis and judgment; data collected using crudely developed instruments.
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?? Re-examine the five research methods.

- a. Which do you think is commonly used in ODL research?
- b. Which method do you think is difficult to apply in distance education research?
- c. How much did you know about the negatives and positives of each method before reading this chapter?

This is quite an important activity, which requires you to reflect on an important aspect of research, namely, what method(s) to use within a given study. Try and internalize the positive and negative aspects of each method for application in any study you will undertake.

One negative feature characteristic of all five types is foreknowledge of outcome, that is, the researcher already knows the result before carrying out the study (cf. Naidu, 2004). As an example, a topic like: “Problems faced by distance education learners at X College”, is not likely to surprise the reader mainly because problems of that nature have already been researched into, and are accessible in DE literature without necessarily conducting research.

Data interpretation was both statistical and qualitative. Statistically, the frequency of individual categories was tallied and reduced to percentages of the total before comparisons were made. Conclusions were then drawn. Qualitatively, articles were subjected to analysis for purposes of determining the rigour evident in the use of each methodology type. In particular, the positive and negative features of each methodology were used as criteria for quality evaluation.

Findings

Findings of the study are presented in this order: results on the priority areas of distance education research; statistical results on the methodology types; and qualitative results based on the interpretation of articles against the positive and negative criteria characterizing each methodology type.

The priority areas

Table 2 below reflects the findings on the areas of research priority already alluded to, following Panda’s Areas of research priority.

Table 2

Number of articles: 67

Area	No. of articles	Percentage
1. Concept, growth and development	7	10.4
2. Curriculum / course planning and development	4	6.0

3. Instruction / teaching	11	16.4
4. Media and technology	10	15.0
5. Learners and learning	13	19.4
6. Institutional policy and management	7	10.4
7. Economics (of distance education)	1	1.5
8. Evaluation (of a phenomenon)	11	16.4
9. Staff development	1	1.5
10. Research and scholarship	2	3.0
Total	67	100

The majority of articles, 35 out of 67 or 52.2%, are on the three areas concerned with learner support, with the category of learners and learning at the top, followed by articles concerned with instruction/teaching and evaluation of learning processes (accounting for 16.4% each). This is followed by the category of media and technology in learning support claiming 10 out of 67 articles or 15 % of the total. Almost all the articles in the category are concerned with how media can best be used to support the learner. In a sense this category is largely about learner support, and is contiguous with the three top ones. Altogether, therefore, articles in the broader category of learner support account for 67%. This signifies a pattern in terms of areas of priority for researchers in Southern Africa. Next in preference, and holding the same position each with 7 out of 67 or 10.4% each, are articles in the area of concepts, growth and development, and institutional policy and management. Surprisingly, curriculum/course planning and development account for only 6%, that is, 4 out of the 67 articles. Research and scholarship category has 2 out of 67 articles, and the least researched areas are Economics of DE and staff development with only one article each.

The emerging pattern is that each of the ten areas of priority objectified, using the analytical framework, was represented in the literature, albeit not equally. Analysis of the literature indicated that the area of pedagogy/learner support as opposed to staff development, economics of DE, and research and scholarship, which are pegged at the bottom of research priority, are more commonly discussed.

It can be concluded that currently, research effort in the sub region is more focused on pedagogy than the other areas of ODL practice.

The types of methodology

Table 3 lists categories of research methodology, the first four by Phipps and Merisotis (1998) and the fifth one by Naidu (2004).

Table 3: Categories of research methodology

Category	Number of articles	%
Descriptive study	27	40.2
Case study	26	38.8
Experimental study	2	3.1
Correlational study	3	4.5
Evaluation study	9	13.4

Total	67	100
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Claiming the highest percentages are descriptive studies, accounting for 27 out of 67 articles (40.2%), followed by case studies claiming 26 articles or 38.8% of the total. These two account for 79% of the articles. Third in place is evaluation research, claiming 13.4%. There were 3 correlation studies, and only 2 experimental studies (last in the methodology types that were evident).

A trend is noticeable. In the first place, all the five types are represented in the literature, which shows that at methodology level, research in Southern Africa is comparable to what obtains internationally (cf. Berge and Morozowski, 2004). Secondly, there is a pattern showing more use of either descriptive or case study methodologies. In actual fact, as will be elucidated later, one found it difficult to distinguish between these two. Evidence showed that where a description was the primary method, more often than not, the case study method was used conjointly, and vice versa. A more striking pattern is the dearth of experimental studies. The well-known argument is that these are more scientific and objective, hence are expected to yield results that are more authentic by bringing out evidence of new knowledge towards the improvement of practice. Despite that, they are scarce in the literature. Relative to the other four, the experimental method is considered to be the most rigorous of the five. When viewed that way, the results probably show some inclination towards less rigorous research in DE studies conducted in Southern Africa.

?? What lessons do you, as a practitioner and scholar learn from the findings about methods currently used in conducting research?

The Quality

The attribute of quality in the present context refers to excellence regarding the way categories of research priority, methodology and structure of the articles are handled. As Cookson (2002:2) puts it, “excellence is the state of being good or superior relative to certain standards”. For example, a study on interactive learning is said to be of quality if the researcher shows a comparative perspective of the research area and chooses the most appropriate methodology against the criteria of reliable and valid data; the revelation of trends in the discipline; innovativeness; the charting of new directions in the subject under investigation; and making a contribution to what is already known. Quality is synonymous with rigour, and with the help of the features of each methodology type (see Table 1), close reference will now be made to some of the articles.

Out of the 27 descriptive studies, only five reflected some of the positive criteria noted in Table 1. The article: “Towards facilitating a human rights culture at a distance” (cf. *Progressio*, 25(1) 2003), while dealing with the common theme of culture through a survey within a given context, goes beyond mere description. It collects valid data in the given context, and makes a contribution by showing how findings on human rights in distance education can be generalized to comparable situations.

One article: “Learning support in a severely underdeveloped context as experienced by distance learners” (cf. *International journal of Open and Distance Learning* Vol.1,

2007), uses attitude scales and interviews to collect data. The description, though narrative, makes use of validated tools and reflects innovativeness when dealing with the subject. In other words, the good descriptive studies managed to bring out evidence of what happens in the field, thus meeting reader expectation. Otherwise, as Naidu (2004:3) puts it, “no one wants to read a description...if there is nothing inherently creative or ambitious about the process”.

The generality of the literature (22 articles), dealt with topics such as quality assurance, face-to-face interaction, teaching management, learning materials, and so forth. Except for few exceptions, the commonly used tools were questionnaires, interviews and review of written records. This is perfectly acceptable, but what was most striking was that the instruments, especially questionnaires, did not seem to have been carefully thought out or validated. In the majority of cases too, the studies told nothing new other than simply reporting or narrating challenges faced by distance education learners. There was very little creativity, if any, about the approaches to the studies, and apart from specifying what was happening in a given situation, there was no attempt to go beyond by infusing what Mishra (1998) has called cross-cultural insights. In a study on research, scholarship and publishing in DE, Naidu (2004:3) without mincing his words, observes that there are more of bad than good studies. He says, “the bad ones, and there are plenty of these, are boring, and they tell you nothing new.”

What the researcher thought was even more disconcerting was the apparent possession of foreknowledge of the research outcome. It appeared individual researchers knew, for example, what the challenges were or what the benefits of face-to-face tutorials were even before collecting data. In essence, this defeated the whole purpose of conducting research. Commenting on the methodology itself, Minnis (1985), that is over twenty years ago, observed that, “most research remains overwhelmingly descriptive. The focus is narrow, with emphasis on particular institutional problems”. Results from the present study revealed that in the context of Southern Africa, the situation is very similar to that observed by Minnis two decades ago.

As one would have expected, literature in the case study methodology specified the context as well as challenges in a given aspect of distance education within an institution, then indicated institutional strategies used. That was followed by a defense of the ways used to overcome the challenges. Only three out of 26 articles were singled out as being most rigorous in the manner of reporting.

One of the articles successfully managed to bring out some commonality as well as some divergence, which would be of interest to DE practitioners regarding the training of teachers by distance education. In that regard the literature contributes to what is already known, albeit in a creative fashion.

Analysis of articles revealed certain trends. To begin with, they all tended to tell stories by describing phenomena. In the majority of cases there was no focus on the innovativeness of what was being described. One would have expected critical analysis that could lead to novel and generalisable insights. The use of instruments such as oral interviews did not seem properly guided by principles necessary in formulating questions. The narratives move pedestrian fashion. For example, one

comes across some trite description of a delivery technology or how a regional manager manages a region. This has led some scholars to criticizing this research type as weak (e.g. Mitchell, 1991). In other words, the sort of ordinariness that rouses little excitement or surprise in the reader characterizes the majority of research publications, across the five methodology types. Now reflect on quality issues by responding to this activity.

?? a. Identify the main weaknesses raised by the author in the foregoing discussion of quality research studies.

b. As an ODL practitioner, how do you propose to address those weaknesses?

Several shortcomings are identifiable, and these include:

- lack of cross-situational comparison;
- use of methods that are not properly validated;
- use of inappropriate methods; and
- merely telling stories instead of adopting a proper research slant.

Concluding remarks

From the foregoing, there can be no doubt that practitioners, who engage in research should make a more conscious effort to broaden their research interests. Of particular importance is the need to develop, as a matter of academic priority, cross-cultural and comparative perspectives. One of the issues that seems to account for the weak research effort is the lack of skills in conducting research. There is, therefore, the need for what is best termed as re-tooling. The re-tooling activity implies that institutions should make a conscious effort to expose professionals and any interested DE stakeholders to ideas about practitioner research, and in particular to more rigorous methodologies.

Four general concerns have been noted as evidence of gaps in DE research and scholarship in our region:

- focus on a limited number of areas of research priority;
- a weak methodological base that is largely descriptive;
- scarcity of experimental research; and
- lack of theoretical grounding.

These trends lead me to formulate what I call the *theory of ordinariness*, applicable to any research where the quality of excellence is compromised because of the prevalence of the four characteristics. In my opinion ordinariness is typified by overt reliance on the commonsensical rather than the empirical when making a research presentation.

Ordinariness theory hypothesises that there is a lack of innovativeness and a dependence on narrating institutional platitudes. From that perspective, research literature brings out evidence of limited applicability that fails to meet expectations of what we should see happening in DE as a discipline. However, I wish to argue that ordinariness typifies a passing phase in the research culture of a given environment. In Southern Africa, DE research is still in its early stage - the infancy stage. It is characterised by a great deal of enthusiasm to inform, but limited skill and training. This stage passes when training is consciously sought in order to appreciate the scope and procedures rated to be more scholarly. The direct result would be a maturing research orientation evident in the quality of excellence in works of research. In the conscious furtherance of DE research, organisations should consciously strive to identify barriers in their situations, and address them squarely, guided by lessons drawn from comparable circumstances.

?? Four concerns that indicate limited research scholarship have been identified. Suggest any two ways of addressing each one of them, bearing in mind the research capacity of the institution you work for.

?? Four concerns that indicate limited research scholarship have been identified. Suggest any two ways of addressing each one of them, bearing in mind the research capacity of the institution you work for.

Concern	Ways of addressing it
Focus on a limited number of areas of research priority	
A weak methodological base that is largely descriptive	
Scarcity of experimental research	
Lack of theoretical grounding	

Use the opportunity to respond to the activity to objectively examine your situation, and take steps to ensure insights drawn from this chapter find scope for application. Discuss your views with colleagues in distance education. Before you move on, give your views on the proposed theory of ordinariness.

Challenges

After our lengthy discussion on the issue of research and scholarship, it will now be overtly clear that there are several challenges. These have been both explicit and implicit, and only a few will be noted below.

- The lack of training in research is a major challenge for aspiring practitioners. In the majority of cases this is linked with lack of funding for the activity.
- Linked to training is the question of what type of courses are available. Typically, ideas and theories about research can be somewhat rigorous for minds that have been out of touch with academia for some time. It is therefore, a challenge for us in the sub region to come up with short courses and certificate awarding programmes to address the challenge.
- Many ODL practitioners are drawn from either conventional schools or universities. Although they may have expertise in their respective disciplines, they still lack proper induction about ODL and the way it should be practised.
- Emerging institutions are often faced with challenges of benchmarking in whatever they do. One of the challenges is failure by such institutions to collaborate with established ones, as well as with other international organisations that could assist in progressing the research agenda.

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CHAPTER 12

Quality Promotion in ODL Provision in Southern Africa

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Some Questions

1. Why distance education in Southern Africa?
2. What is meant by these concepts: *quality and quality assurance*?
3. How can ODL institutions enhance quality?
4. How can we introduce and sustain QA systems that are relevant?
5. Why are quality assurance policies necessary?
6. Which are the core ODL areas that should be quality assured?
7. What theories facilitate a clearer understanding of QA?

8. How are QA criteria defined?

9. How can quality be enhanced in ODL practice?

10. What challenges do institutions face in trying to implement QA systems?

Introduction

There is no doubt that Open and Distance Education is fast gaining importance globally. In Southern Africa, the importance of ODL is demonstrated by the increasing number of providers at various levels of the education system; ranging from primary to tertiary level. As Glennie (2008) observes, the distinction between distance and full time learning is becoming more and more blurred as most conventional institutions are now offering part-time programmes alongside traditional face-to-face programmes. In most of these programmes learners do most of their learning at a distance, and distinguishing between full-time and distance programmes becomes a matter of notional hours. I cannot think of any country in the region where there is no form of distance education in one form or another. The many organisations on the African continent focusing their attention primarily on distance education like the Distance Education Association of Southern Africa (DEASA), African Council of Distance Education (ACDE) and the National Association of Distance Organisations of South Africa (NADEOSA, bear testimony to the growing importance accorded to this mode of educational delivering in Sub –Saharan Africa (SSA). Increasingly, educational policy on access is being steered more and more in favour of distance education. Indeed, as individual countries (and institutions) and as a regional group we have the responsibility to ensure that as this mode of educational provision expands, it remains credible and comparable to the conventional system. In most of our countries where this form of education has not been mainstreamed and where regulatory policies have been largely implicit, we face the huge challenge of convincing the public that ODL is not second rate alternative.

Reflecting on statistics

The growing need for distance education is borne out of felt need. In Oceania, almost two thirds of children of secondary school age are out of school. Abrioux, (2009:4) notes that in Sub-Saharan Africa, only one child in four participated in secondary schooling in 2006, leaving some 78 million of the school-age children out of school. In the SADC countries alone, this figure was reported to have been 8.7 million by 2003 (SADC 2006). Limited access at secondary school level is coupled with worryingly high levels of inefficiency of the systems. In SSA, of those who enter lower secondary, less than one third of them survive to upper secondary. Research shows that 35 of SSA countries have secondary Gross Enrolment Ratios (GERs) that are below 40%, and 15 below 20%. On average, the sub-Saharan African region has a secondary GER of 25%, compared to the Arab States with 60%, South and Western Asia with 52%, the Pacific with 65%, and Latin America and the Caribbean with 83% (Lewin 2008). Clearly the glaring gap between SSA and other developing regions is

cause for great concern as it has obvious implications for economic growth. Given the limited access to secondary education that bedevils most countries, chances for significant improvement of such low GERs remain remote on the continent, for as long as countries rely on conventional models of delivery.

As Lockwood, (2010) asserts, even with the success of the Education for All (EFA) campaign, it is estimated that by 2015 there will be 30 million children who will be unable to receive a primary school education. It is further estimated that the world will need an additional 10 million teachers by this date and that there will be over 400 million children aged 12-17 years who will be unable to benefit from a secondary school education. The amount of resources needed to build more schools and train enough teachers to contain the increasing demand for secondary education is far beyond the means of developing countries. Neither is such investment economically sustainable, given the changing nature of market economies that call for life-long learning.

?? What is the significance of these statistics regarding the provision of education in your country?

In view of the increasing role of distance education in Africa, countries are strongly encouraged to balance quality and quantity so that this mode of delivery can not only remain competitive, but also yield significant social and individual returns.

The promise of ODL

It has become evident that existing high cost secondary education systems that were designed to educate a small elite cannot be able to cater for a much greater population of youth in a way that provides the growing economies of Africa with the necessary human resource expertise. Neither can they prepare the youth for the fast-changing global economies that call for ability to engage in lifelong learning. In this environment, linear expansion of existing systems is not an option, especially given the constraints on public resources available for secondary education.

Research has shown that ODL has the potential to address the problem of access in cost-effective ways. Indeed, we already have within the region what the current President of COL, Sir John Daniel, refers to as mega institutions. Some of them are doing a wonderful job. We also witness significant expansion of these ODL institutions in terms of student enrolments as well as programme offerings. I would like to argue here, that the benefits of such expansion lie squarely in the provision of high quality education. Poor educational provision is counter productive as the amount of investments we make into the systems would not necessarily translate into the desired benefits – the masses of our people remain illiterate and unskilled, we continue to suffer human resource shortages, economic and social progress remains retarded, and the majority of our populations remain trapped in the poverty circle. The amount of education provided is just as important as the quality of provision.

??

a. What does 'quality' mean to you?

b. What is your understanding of 'quality assurance' in as far as distance education provision is concerned?

Put simply, *quality* refers to a product or service that is fit for purpose. A quality system consistently meets customer requirements with enhanced satisfaction through effective application of sound systems and activities. *Quality assurance*, on the other hand, refers to the conscious steps taken by stakeholders in the distance education system to ensure adherence to quality. What follows is a more detailed explication of the two notions in practice.

The need for quality (assurance)

Our efforts at expanding ODL provision should be equally matched by efforts in improving the quality of that provision. This is a known and indisputable fact. The question however is: How can we introduce and sustain QA systems that are relevant, that effectively make a difference in the quality of education institutions, their operations, their programs and in general, in the capacity of education to answer to the current and future needs of society, at the local, national and regional levels?

In this chapter I propose that to achieve quality we need to deliberately put in place appropriate quality assurance policies, adopt the right quality assurance approaches, and invest in positive quality promotion strategies.

?? What is meant by a quality assurance policy in your institution?

Briefly, a policy is a set of guidelines showing what is to be done in a given situation. A quality assurance policy refers to institutional or national guidelines on the processes and procedures that should be followed in order to ensure that set standards are achieved. Such policy also regulates the activities of all stakeholders so as to direct their diverse roles towards the achievement of common goals. More detailed discussion follows.

The need for appropriate quality assurance policies

Quality enhancement in an institution is premised on sound quality assurance policy, at institutional as well as at national (systemic) level. Educational institutions, especially universities have always been conscious of quality issues. They have always had various ways and mechanisms of ensuring that their operations are above board in terms of quality assurance. Often, quality regulatory instruments are found in various institutional documents such as senate regulations, admission policies, mission statements and strategic plans. To a large extent, the quality assurance

policies enshrined in these documents were very implicit and various stakeholders within institutions knew the rules of the game and their actions were regulated and directed by them. At the same time, the public had confidence and trust in the ability of the institution to deliver. If anything, very little was questioned of the integrity of a university. It was the epitome of knowledge generation and the hub of societal civilization.

This position has however changed. We now witness a new wave of change in terms of the student clientele universities serve; the challenges they face; their societal expectations; their relationship with outside stakeholders, in particular the state; and their funding mechanisms. All these factors have had profound influence on how institutions should handle their quality assurance arrangements. The current trend is that institutions are required to develop explicit quality assurance policies and institute robust, transparent quality assurance activities for their institutions, not only to serve internal interests but also the interests of stakeholders external to the institution. They now have to prove their relative worth amidst competition from other knowledge generators like research institutes and professional research organisations.

Thus, the shift from implicit quality assurance arrangements to adopting more explicit practices that can be observed by outside stakeholders seems to be primarily a response to external stakeholder requirements, especially government. While the approach brings about institutional improvement, the primary motive behind the new quality assurance regime is to enable the state and other relevant external stakeholders to understand and keep track of how the institution is performing. Quality assurance is strongly anchored in accountability values. There is increasing demand from the state for accountability on the expenditure of public funds in an environment where greater accountability and openness on the part of public institutions has become the norm. This position is in keeping with higher education practices in the developed world where, as Pierce (1995) would argue, people have become more critical of authority and are no longer willing to place total confidence in the “ivory tower” image of tertiary institutions, but they do expect evidence that higher education is providing good quality service and value for money. Pierce (1995:2) makes the following observation.

The expansion of tertiary education systems, their increased diversification, the need to legitimize the use of public funds and increased market pressures are all factors that subject higher education to close scrutiny, and its quality, effectiveness and efficiency are no longer taken for granted, but must be demonstrated and verified.

Quality assurance is designed to *prove* and *improve* the quality of an institution’s methods, and educational products and outcomes. Our quality is there to be seen by outsiders; it is the only way we can convince the public that we are reputable institutions. Explicit quality assurance policies that are developed through consensus, that are effectively communicated, and that are owned by staff form a good basis for a sound quality assurance framework.

?? a. Think of the different higher education institutions in your country, both face-

to-face and ODL. What are the positive and the negative comments the public generally makes about them? Post the comments in the matrix below:

Institution	Positive aspects	Negative aspects
A		
B		
C		
D		
E		

b. Which institution is generally considered the best? Suggest reasons why it is perceived that way.

There is no right or wrong answer here. It is important to share your response with colleagues. That way you will gain deeper insight from other people’s findings.

Adopting appropriate quality assurance approaches

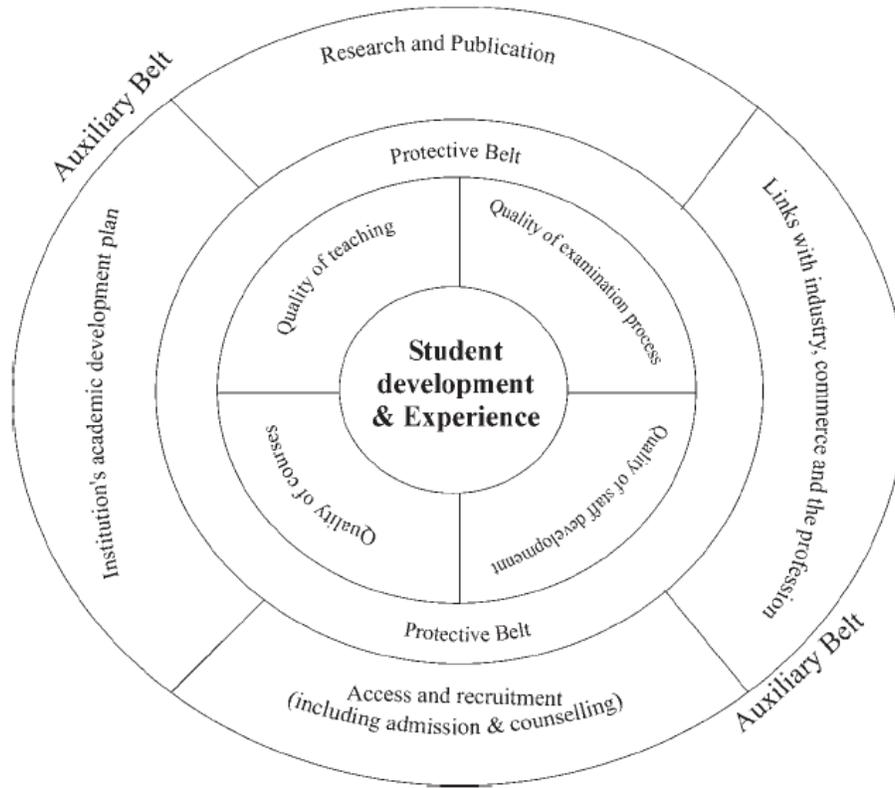
Definitions of **quality** and **quality assurance** are extensively dealt with in the literature, and there are no commonly held understandings of what constitutes quality in the higher education sector. What is important to point out though is that quality is always contextually bound; hence the importance of striking some shared understanding of what it is people want to assure within a given context. The notion of quality is therefore something that is negotiated and communicated within a given institution or country. **Quality** is the professional sense of responsibility by actors within an institution to uphold standards in whatever they do. It is a process of critical dialogue within an institution where there is a culture of continuous care for the students’ quality course experience (see Barnett, 1992). Ultimately the aim of upholding quality standards of an institution is to try and maximize enrichment of student learning experiences and outputs.

Investment in quality is worthwhile if it impacts positively on student transformation. A quality conscious institution succeeds in adding significant value to students through learning experiences and realizes high rates of graduate outputs in most efficient ways. One of the societal expectations of a university, regardless of its type, is that it should have a positive impact on society in terms of development. It is a catalyst for social development. There are special qualities it bestows upon those who go through its curriculum. This is how society evaluates the standing of any

institution. Thus, relevance is a critical dimension of quality in education, particularly in the developing context. An institution's relevance is manifested in society through the medium of its graduates, hence the importance of making sufficient imprint on such graduates during the course of their study in an institution.

Barnett (1992) explains four chore activities that directly impact on student development and student experience in an educational institution. Figure 1 below illustrates these activities.

Figure 1: Barnett's Quality Framework



Source: Barnett (1992) (cited in Mishra, 2006)

According to Barnett, the core activities that impact directly on learners in any teaching –learning situation are:

- the quality of the programmes and courses learners go through,
- the quality of teaching support provided,
- the quality of teachers that mediate the learning process, and
- the quality of assessment systems.

No institution can achieve quality service if there is laxity in any one of these core ingredients of educational provision in terms of quality. Barnett further argues that around these four areas, there is a belt of support factors – some kind of enhancers. These enhancing factors include:

- an institution's academic development plan,
- research and development,
- linkages with strategic external partners like industry and professional bodies, and
- access and recruitment policies and practices.

Barnett's model is useful in terms of identifying key areas where an institution needs

to tighten its quality arrangements. Whilst they apply to any educational institution, these areas have particular relevance to distance education providers whose student body is highly diversified and the learning classroom is virtual. Both student diversity and the virtual and dispersed nature of the class pose challenges in terms of quality delivery and value to be added to the learner through institution-guided learning processes.

Kirkpatrick (n.d.) presents another interesting framework for managing quality in an ODL institution. The framework outlines the following broad aspects of distance education that always need to be addressed from a quality assurance perspective:

- a. **General philosophy:** Policy and mission statements, ethos and culture of the organisation, mottoes, attitudes of staff and levels of staff commitment. These aspects help hold everybody and everything together in an institution. They give direction and purpose to every activity of an institution.
- b. **Products:** Learning materials, courses, resources, media, outputs (progression and retention rates, number of graduates), assessment outcomes (pass rates, standards of performance)
- c. **Services:** Registration and advisory services, tutoring, counseling, feedback and guidance on learning, provision and management of study centres and resources, ICT help desks, and responsiveness to issues.
- d. **Support processes:** Delivery systems, record keeping, scheduling, electronic backup, warehousing and stock control, and QA procedures.

Thus, the quality of an institution is embedded in these key activities of delivery and quality standards need to be developed around these areas.

Definition: In the absence of a commonly agreed single definition, I probably need to stress the composite nature of the concept of quality assurance, which includes all policies, systems, and processes that are directed towards ensuring the maintenance and enhancement of the quality of educational provision within an institution (Bateman, 2008). In line with the argument given under policy above, an appropriate definition of quality assurance is that it is the means by which an institution confirms to itself and to others that the conditions are in place for students to achieve the standards that the institution has set.

A systematic and consistent QA system helps to establish an institution's good reputation and image. It includes defined standards of achievement, documented procedures for all identified processes, established ways of responding to issues and clear accountability for outcomes. The result is greater public confidence, more satisfied students, efficient processes and staff who are confident in their jobs. Students are more likely to experience better quality instruction, learning materials and interactions with the institution and its staff, leading to enhanced learning outcomes. Satisfied students are more likely to choose that institution again or to recommend it to others. Development of such a robust quality assurance systems is based on appropriate quality assurance approaches.

?? Activity

With reference to Barnett's Quality Framework, comment on the level of satisfaction you have about the services of your institution. State either **satisfied** or **dissatisfied** in the second column.

Core activity	Satisfied/Dissatisfied
The quality of the programmes and courses learners go through,	
The quality of teaching support provided,	
The quality of teachers that mediate the learning process, and	
The quality of assessment systems.	

If you are satisfied, that is a good state of affairs. Strive to sustain the level of satisfaction. If dissatisfied by any one activity, find ways of improving the state of affairs.

Quality assurance and power

QA is about evaluation and evaluation is about exercise of power. There are always power tensions in quality assurance. The issue of quality assurance approach is often highly contested because of vested interests. Often, there is a tendency for defining quality from a top-down, bureaucratic point of view, and it becomes non-developmental because institutions implement it in a compliance fashion. This does not help institutions to improve, or to take responsibility for the quality of their work. If the main concern of QA is really the quality of the service rendered, it needs to develop a much more rationalised approach. Sound quality assurance systems must avoid being managerialistic and prioritize the improvement aspect of an institution.

Quality assurance in an educational institution serves various purposes and interests of various groups of people. Thus, quality assurance can be explained with reference to the purpose it serves in education. As Barnett (1994) has indicated, different quality assurance systems serve different purposes. On the one hand they may serve the purpose of enhancing self-improvement, whilst on the other they may act as state-surveillance mechanisms and serve accountability purposes. Of significance to the analysis pursued in this section is also the notion of power suggested by Lockett (2005:20). In her view, quality assurance systems are replete with power tensions and the "... dialogue structure is contoured by unequal power relationships" (Barnett, 1994:168). In this regard, key questions that need to be asked in analysing any quality assurance system are:

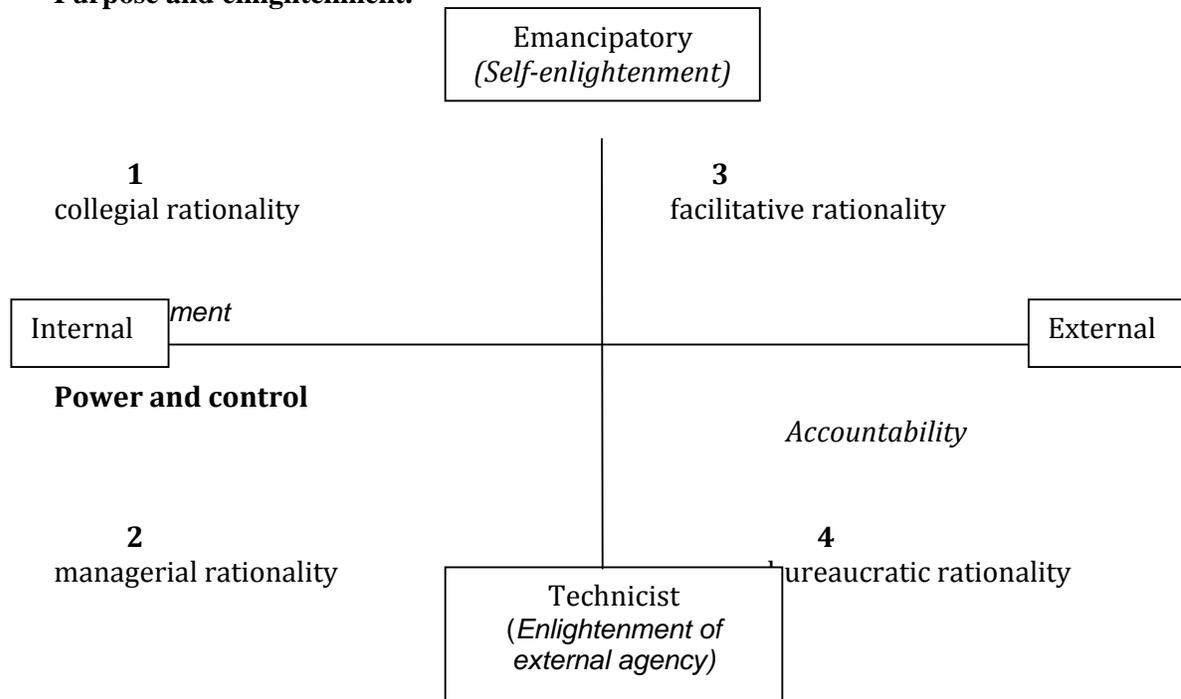
- Who is in control of the evaluation?
- Who initiates it and who owns it?
- Is the ownership internal or external to the academic community?

Lockett's notions of purpose and power tensions provide very useful lenses through which the different quality assurance approaches used in different contexts can be understood. Using these two notions as an analytical framework, institutions can establish whether their quality assurance approaches are self-enlightening or accountability-driven.

Borrowing from Barnett and Lockett’s work, I recommend that institutions review the appropriateness of their quality assurance approaches using the two main analytical dimensions referred to above. The first of these dimensions is **the purpose** of a quality assurance system – whether it is self-enlightening in order to enhance self-improvement, or whether it enlightens external stakeholders so they understand better what happens in the institution. The second dimension has to do with **power dynamics** in the quality assurance system – whether the locus of power is internal to the institution, or whether it is located outside the institution. Such power is often defined by the reporting lines in the quality assurance system: Is the institution required to report its quality assurance arrangements to an outside agency or are the reporting lines internal? These reporting lines reflect who is in control of the whole quality assurance system, and to whom the university is accountable in terms of its quality assurance arrangements. Power dynamics and control mechanisms often show who the key driver of the quality assurance system is. Figure 2 summarises the key features of the theoretical framework discussed in this section:

Fig.2: Towards a theoretical framework for understanding approaches to quality assurance

Purpose and enlightenment.



(Adapted from Lockett, 2004 and Barnett, 1994)

The key message to be drawn from the theoretical analysis above is that national quality assessment and assurance systems should balance the internal and external needs of an institution, both to create an improvement-oriented climate within institutions (universities and colleges), as well as to gain legitimacy from actors outside higher education.

Importance of working with quality criteria

So, why do you think it is essential to work with quality criteria? Quality assurance is about constant collection of data, analysing the data and feeding back to institutional planning. It is about constant monitoring of the various elements of institutional operations in order to keep track of the overall performance of an institution. **The whole is made of its constituent parts.** Monitoring the performance of an institution entails monitoring the constituent dimensions of its day-to-day operations and defining criteria to work with is a major step towards instituting credible quality assurance arrangements in an institution. In applying standards and criteria it is important to take into account the different stages of development of different types of institutions in a country. In a sense, quality criteria are a way of giving practical effect to the quality assurance policy of an institution. They provide an agreed description of the quality benchmarks to be achieved, as well as a checklist of what needs to be done in order to meet them. One of the major advantages of working with criteria is that they form a good basis for regular self-reviews for self-improvement purposes. Criteria make it possible for an institution to identify weak areas where improvement is needed, or establish whether a provider meets the minimum requirements for offering ODL services. They also make it possible to compare performance in specific areas across institutions and across programmes within an institution. Where external evaluation takes place, criteria make it easy to conduct such evaluation and the process becomes more objective. This is particularly true with open schools most of which have to be accredited and regularly evaluated by Ministries of Education.

In developing criteria, it is useful to think of an ODL institution as a system with inter-related parts. Thus, criteria can be conceptualised within a systems model, where an institution is viewed as comprising inputs that facilitate certain processes in order to achieve desired outputs. The inter-relationship between and amongst the various input, process, and output elements helps to define specific criteria around these variables of an institution. Whatever quality assurance is adopted in any context should equally address the three areas of input, process and output.

Increasingly, there is interest in tracking graduates of an institution in the world of work in order to get a sense of how well they are performing. Strategies that furnish institutions with this kind of information should be sought so as to enable educational innovations to keep pace with trends on the market and to maintain relevance. Quality assurance arrangements of an institution must speak to this aspect.

4.2.2 Guidelines on defining quality criteria

Much work has been done by various organisations by way of defining quality criteria in ODL. I refer readers to the quality criteria that were developed initially for use in South Africa by the National Association of Distance Education Organisations of South Africa (NADEOSA), but now widely used in some countries in Africa and beyond. These criteria show what good practice in distance education is (cf. info@saide.org.za). The second set of criteria I refer readers to was developed by the National Assessment and Accreditation Council (NAAC) for Teacher Education: “*Quality Indicators for Teacher Education*”, a booklet on identifying and using various quality indicators (QIs) for self assessment by the institutions. The third set is an integral part of the quality assurance toolkit that was launched at the PCF6 held in India in November 2010 by the Commonwealth of Learning. This toolkit, which was

developed by Saide working with partner institutions in Commonwealth countries has open schools as the primary target users. It was developed on behalf of COL as part of its efforts at enhancing the quality of open and distance learning throughout the world. It defines thirteen key criteria that are broken down into numerous quality elements, which can be used for measuring as well as monitoring an institution's performance. The main strength of this toolkit is that it is adaptable to ODL institutions in different contexts.

COL's efforts at enhancing the quality of ODL offerings need to be augmented by implementing programmes that maximize utilization of these resources. For the toolkits to translate into practice on the ground there is need for capacity building of practitioners through workshops and other forms of dialogue on how best to implement them. Individual institutions and regional organisations like DEASA and the African Council for Distance Education Quality Assurance and Accreditation Agency (ACDE-QAAA) should stand up to the quality challenges that are posed by mass distance education and plan the unrolling of programmes that help develop a critical mass of people with expertise in developing and implementing robust QA systems in ODL in Africa. I would also like to suggest here that we seriously consider harnessing available Information and Communication Technologies (ICTs) to enhance effective use of the toolkits referred to above.

?? Suggest criteria that could be used by your institution for quality assurance purposes.

In order to respond to this question, go through the sources mentioned above and identify criteria that would work in your institution, and which ones you would like to prioritise.

Other strategies of promoting quality

Trends in education show substantial increase in internationalisation, a process that has come to be associated with increasing student and staff mobility across national boundaries. Indeed these boundaries have also become much more porous in terms of providers of higher education and labour mobility. As education spreads across borders, so too, must quality assurance (Commonwealth of Learning, 2010). The internationalisation of quality assurance is one of the most striking new developments in higher education that has come as a result of the prevalence of cross-border education and eLearning. There is urgent need for ODL institutions to keep pace with the processes of internationalisation, globalisation, regional integration and the ever-increasing mobility of students and faculty. Qualifications and credits have to be transferable across institutions and across national boundaries. One way of promoting such regional integration of systems is by establishing a regional qualifications framework (QF) and a regional quality assurance agency. It is on this understanding that the establishment of a Quality Assurance and Accreditation Agency (QAAA) by the ACDE in 2010 is commendable. Amongst other responsibilities, the ACDE-

QAAA will encourage and support countries and institutions in developing ODL policies in order for them to improve access by rolling out mass higher education through open access. As Jegede (2010) notes, currently there are less than ten countries in Africa that have comprehensive ODL policies. Without a well-crafted and implementable ODL policy, it is not possible for African countries to achieve educational and national development through ODL. Experience in the Organisation for Economic and Cooperative Development (OECD) demonstrates how influential a central agency can be in steering education policy in general and quality assurance in particular at regional level. It is a mechanism by which the quality standards of low performing institutions can be raised and capacity in quality assurance can be enhanced. In Southern Africa, such an agency is long overdue, given the extent of involvement of student and labour movements that has taken place over the last ten or so years.

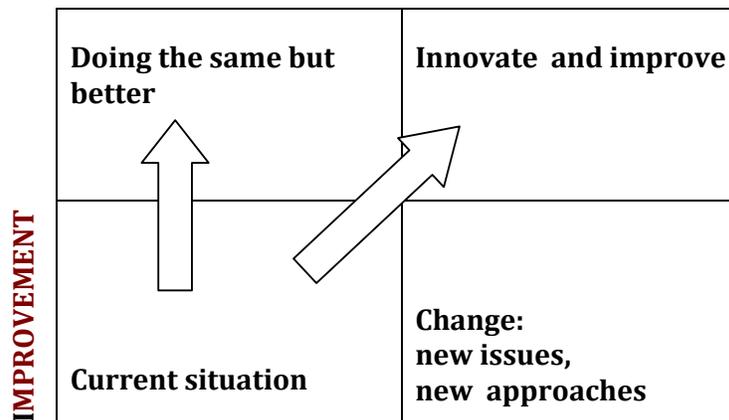
The major strength of a regional quality assurance agency lies in its ability to harmonise ODL policy and practice, including benchmarking quality standards. By using agreed quality criteria such a regional body can go a long way in building capacity for quality management in ODL institutions as well as in coordinating regular quality audits that help institutions observe their quality mandate. The varied nature of not only ODL but also conventional face-to-face education institutions in the region is just alarming. This is in spite of increased inter-institutional and cross-border movement of students alluded to above. Some degree of harmonisation of quality assurance practices is necessary if regional integration in terms of qualifications is to be achieved.

?? What is your view about quality assurance with regard to harmonisation and integration in the SADC region?

For integration and harmonisation to occur, our countries should pay close attention to quality assurance criteria by applying them consciously.

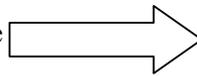
In her seminal presentation at the International Quality Assurance Agency for Higher Education (INQAAHE) conference held in Abu Dhabi in March 2009, one of the leading quality assurance experts, Lemaitre (2009) gives some of the functions of a quality assurance agency. She argues that there are three practical ways of improving the quality of an institution's delivery practices. The first is by doing better (improving) what an institution has always been doing and the second is changing from traditional practice and doing new things in new ways – being innovative. Between these two approaches is a third approach, which consists of both improvement and innovation. Lemaitre argues that a quality assurance agency is best placed to help institutions innovate and improve so as to enhance their quality. Figure 3 below illustrates Lemaitre's model of quality enhancement in a higher education institution.

Fig.3 Quality enhancement in higher education



INNOVATION

Source: Maria Jose Lemaitre



Quality assurance in higher education is about innovation, given the problem of resource constraints that many institutions face. Only institutions that are innovative enough can enhance the quality of their delivery and carve themselves a niche on the increasingly competitive market.

Apart from promoting quality standards through a regional coordinating agency, there is merit for countries to engage in inter-institutional, inter-regional and international collaboration in quality promotion. Such collaboration is particularly pertinent for ODL institutions where the development of high quality learning materials, programme development and developing a critical mass of ODL expertise are costly endeavours. Where there is collaboration, institutions can make substantial savings by sharing resources. ODL institutions should also aim at concentrating on their niche areas by focusing on what they can do better and continually perfecting themselves in those areas. Thus, within a regional grouping of countries there should be different specializations amongst the various institutions and the benefits of such specializations should be shared amongst collaborating institutions of the region.

?? How do collaboration and concentrating on a niche area enhance quality of products and services offered by an institution?

One of the advantages of collaboration is that an institution is able to benchmark with similar organisations, and that leads to application of best practices. On the other hand, concentrating on a niche area ensures that there will be more focus, rather than focusing on too many projects.

Clearly, there is need for investing in capacity building for quality assurance in the region. The limited expertise currently available is a resource that should be tapped on in order to develop the required capacity for quality management in ODL institutions. There are pockets of excellence in the region that exist in the form of individuals and institutions, both private and public that I believe are under-utilized. These have to be

maximally used across institutions and across countries. Gone are the days when institutions used to operate in isolation of one another and held monopoly over whatever expertise they had. Sharing resources and expertise should be done in a systematic and strategic manner, through regional bodies like the Distance Association of Southern Africa (DEASA), the African Council for Distance Education (ACDE) and the Association of African Universities (AAU). The obvious merit of utilizing local capacity is that countries and institutions stand better chances of developing contextually relevant innovations that are feasible to implement.

Challenges

In dealing with quality issues we are confronted by many challenges and constraints:

- Quality delivery has been negatively impacted by reduction in real value of wages for faculty resulting in moribund faculty morale.
- We are also faced with the more serious problem of loss of social and intellectual capital from the continent in what has come to be known as ‘brain drain’.
- In dealing with quality issues the lack of a robust ICT infrastructure places limits on how far institutions can go in innovating their methods of course development and delivery.
- In many of our organisations, there is no shared understanding of what quality assurance is, and how it ought to be promoted.
- Practitioners who have been doing educational business in particular ways tend to resist new ideas about quality assurance. This is more the case in ODL.

The position I hold in this argument is that all these are issues that need to be dealt with in most innovative ways. Wider participation, effective channels of communication, the collection of acceptable evidence, the acceptance of responsibility by staff and students, and an institutional commitment to staff development and training underpin an effective quality assurance and control system.

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CHAPTER 13

Financing Open and Distance Learning: Sources, Costs and Budgeting

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Some Questions

1. What are the purposes of ODL?
2. What are the benefits of ODL?
3. What is involved in financing ODL?
4. What are the costs of ODL?
5. How are ODL costs calculated?
6. What is meant by economies of scale in ODL?
7. What are the different types of budgeting in ODL?
8. How is the ODL budget administered?

Introduction

From a funding perspective open and distance education has evolved without a funding formula comparable to that for conventional education, yet many countries are increasingly turning to open and distance education, mainly, for its perceived cost-effectiveness. Unlike conventional universities, where the cost of delivery and support structures has traditionally been recognized and underpinned by various funding models, open and distance education has evolved without the benefit of adequate financial support and funding models. This might be attributable partly to the fact that open and distance education evolved as a private sector initiative in which there was no direct government involvement and that the benefits of open and distance education were, initially, not readily discernible to governments. Now that the benefits of open and distance education have become manifest and that it is also no longer seen as exclusively private sector undertaking situated on the fringes of higher education, but is taking centre stage in public policy formulation, it is probably opportune that governments address the need for adequate financial resources in open and distance education. However, before considering funding issues and examining costs and cost structure of open and distance education and exploring possible funding strategies and models, it is important to briefly discuss the main uses, purposes, and benefits of open and distance education.

Purposes and importance of open and distance learning

Open and distance education is increasingly becoming commonplace and is now used in various contexts and by just about everyone involved in the educational process, including pre-tertiary education, higher education, governments, military, corporate world, etc. In these and many other settings where open and distance education is used, it may be used alone or in combination with conventional education. Whether used alone or in combination with conventional contact instruction, open and distance education should be seen as complementing and not competing with conventional education.

In either context, open and distance education is often associated with unparalleled potential to enhance access to education but without necessarily building additional classroom space or bringing learners for on-campus instruction. Open and distance education is also reputed for extending educational opportunities to new learners, especially to under-served groups and those previously excluded by conventional education systems. In addition, the flexibility of open and distance education gives it unparalleled advantages in reaching out to learners in different geographic locations across varied jurisdictions and in isolated settlements.

The purposes of open and distance education are many and varied and may depend on the settings in which it is used. For example,

1. In the public sector governments often turn to open and distance education for several purposes, including providing teachers and other public sector employees with in-service training. In developing countries, where a large number of teachers is untrained or undertrained, open and distance education is often used for purposes of teacher upgrading. For example, at independence in 1980 Zimbabwe introduced a distance taught Zimbabwe Integrated National Teacher Education (ZINTEC) programme to train large numbers of pre-service and untrained primary school teachers, in order to cope with large numbers of primary school children who flooded schools following the introduction of free and compulsory primary education. Similarly, South Africa had also introduced earlier in 1994 a National Diploma in Professional Education for upgrading primary school teachers, following democratic elections that opened unprecedented access to primary education. On the other hand, Botswana introduced in 1999 an in-service open and distance education Diploma in Primary Education (DPE) programme for the upgrading of certificate holder primary school teachers.

Governments also use open and distance education at pre-tertiary education level in order to enhance the quality of conventional primary and secondary schooling through radio, TV, etc. and also to provide opportunities to out-of-school youths and other school dropouts opportunity to access education and training. At the primary school level, where there is limited use of open and

distance education, interactive radio instruction (IRI) model is being used with much

success to improve the quality of primary education in several SADC countries, including Lesotho, South Africa and Botswana. Unlike the primary school level, open and distance education is more widely used by many developing countries as a tool for enhancing access to secondary education. The success of open and distance education at this level has resulted in some countries establishing open schools that have received international

recognition for their achievements in increasing access and improving the quality of secondary education. For example, the Namibia College of Open and Distance Learning (NAMCOL) and the Botswana College of Distance and Open Learning (BOCODOL) are not only internationally acknowledged success stories, but they are unparalleled regional initiatives in the provision of access to secondary education to out-of-school youths and adults through open and distance education. Finally, governments also use open and distance education to deliver instruction to remote settlements and other rural areas that might not otherwise be adequately served by traditional schools.

2. Companies now turn to open and distance education for retooling, multi-skilling, and upgrading workers' skills and also for keeping workers abreast of rapid changes in technology. This is partly because companies find open and distance education as a cost-effective strategy for providing professional upgrading programmes for employees that may be geographically scattered across a country, region or globally. The flexibility of open and distance education brings employees within easy reach and exposes them to a common curriculum that is consistent with company mores and ethics. For example, Microsoft, Apple and Hewlett-Packard run high-tech distance teaching facilities for employees in many sites across the world, while other companies outsource distance learning to external providers such as the National Technological University of the US.
3. There are two main types of universities that offer open and distance education. Single mode universities are dedicated open and distance education providers known as 'open universities', while dual mode universities are traditional universities that combine open and distance education programmes with conventional face-to-face contact instruction. However, in both cases, universities use open and distance education to increase the number of students who have access to higher education.

According to Murphy *et al* (2002:11), not only do African countries offer one or more tertiary open and distance education programmes, the important thing is that the main purposes of these programmes are to "increase overall enrolments in tertiary education and to reach students unable to attend on-campus programmes because of living too far from facilities or because of working schedules that do not permit them to attend regular classes." The acclaimed potential of open and distance education universities to increase access to tertiary education is illustrated by mega-universities such as

University of South Africa (UNISA), Open University United Kingdom (OPUUK), China TV University System, Indira Gandhi National Open University (IGNOU) and Sukhothai Thammathirat Open University (STOU), which are large open universities with annual enrolment sizes of more than 100,000 students.

In the Southern African Development Community (SADC) tertiary open and distance education has a long history going back to 1873, with the founding of the University of the Cape of Good Hope, now called University of South Africa (UNISA) and in Botswana in 1962 when a Zimbabwean commercial correspondence college enrolled fifty (50) in-service teachers. In the last fifteen years three national open universities have been established in Zimbabwe, Tanzania and Mauritius, while Zambia has a private open university and Botswana is exploring the possibility of transforming the national open school, the Botswana College of Distance and Open Learning (BOCODOL), into a national open university. At the same time there has also been significant growth across the SADC region in both the number of traditional institutions offering open and distance education programmes and the number of learners enrolled on these programmes, with institutions such as the Universities of Botswana, Dar es Salaam, Pretoria, Zimbabwe, Zambia, Namibia, and Eduardo Mondlane and Pedagogical Universities in Mozambique featuring among the leaders in combining traditional instruction with open and distance education.

4. At the household level, SADC has a long history of individuals using open and distance education with little or no state support. Individuals use distance learning to pursue various education and training programmes from home or work, as part of their own professional development and also to secure jobs and enhance career opportunities.

?? Explain the importance of funding at household level in your country.

Benefits of open and distance learning

The potential benefits of open and distance education are many, varied and enormous. If well planned and implemented, though no panacea to a host of challenges of developing countries, open and distance education would go a long way in addressing the challenges SADC member states are facing in respect of:

1. inequitable access for disadvantaged groups, such as women and disabled people and people from rural areas or linguistic minorities;
2. the negative impact of HIV and AIDS on the education and training sector;
3. limited access to high-level training and mismatches between supply and demand for skilled labour;
4. low participation rates at tertiary level, characterised by gross enrolment ratios of less than 5% for a majority of member states;
5. high unemployment rates, which range from 25% to over 80% across the Region;
6. shortage of critical skills required for vital higher productivity and global competitiveness;
7. high cost of providing the required infrastructure for enhanced access to conventional education;
8. decimation of an already small high-skills base due to the devastating impact of the HIV/AIDS pandemic and brain drain, which now calls for doubling of tertiary enrolments;
9. urgent need for on-the-job training through the provision of relevant retooling, multi-skilling, and upgrading workers' skills and also for keeping workers abreast of rapid changes in technology.

There is no doubt that open and distance education has become increasingly popular, especially due to the combined effect of global economic slowdown and the utilisation of new communication and information technologies. This interest in tertiary open and distance education is stimulated by widely acknowledged and documented potential benefits of open and distance education in increasing access and equity, cost-efficiency and raising educational quality.

Access and equity. Many countries introduce open and distance education because of its unsurpassed capacity to increase access to education. For example, Sukhothai Thammathirat Open University (STOU) of Thailand doubled its enrolment in ten years from 82 000 in 1980 to 150 000 students by 1990, while Indira Gandhi National Open University (IGNOU) increased its enrolment eight fold within two years and, finally, the Zimbabwe Open University (ZOU) increased its enrolment more than thirty fold within less than ten years, from 668 in 1993 to more than 22 000 in 2002.

According to the World Bank (2000), open and distance education enrolments as a percentage of overall tertiary enrolments, constitute 36% in South Africa, 29% in Madagascar, 22% in Tanzania and 13% of the total university enrolment at the University of Swaziland. At the University of Botswana there was a quantum leap in enrolment figures for an open and distance education diploma in primary education, from around 35% in 1999 when the programme commenced to 60% of the overall primary teacher education enrolments for Botswana by 2003. Open and distance education has had a long tradition of success in teacher training in the SADAC region, from the work in Botswana in the early 1960s, through Tanzania in the 1970s and Zimbabwe in the 1980s, to more recent initiatives in Malawi and Zambia. The success of open and distance education in teacher education is revealed by Robinson (1997) who found that open and distance education courses accounted for about half of all teacher education programmes in Anglophone Africa.

Open and distance education also widens access and increases equity by extending tertiary education to four groups commonly not catered for by conventional education system. These include geographically isolated students, women with household responsibilities, workers and secondary school dropouts and graduates.

Open and distance education extends tertiary education to students in rural areas and isolated or remote locations at considerable savings, while the World Bank (2000) reports that women participation in open and distance education is generally higher than in conventional systems. For example, in Namibia 77% of distance learners are women, 44% in Swaziland, while in South Africa the respective female populations for Vista University and UNISA were 70% and 50%. Unlike conventional education, open and distance education provides opportunities for the workforce to access tertiary education without leaving work and foregoing income. At the same time, open and distance education is better able to accommodate the growing demands for lifelong learning, worker upgrading, retooling and multi-skilling than do conventional campus-based programmes.

The highly competitive and restrictive admission systems of conventional tertiary education exclude many qualified high school graduates. For example, while the story may be similar elsewhere, 78% of prospective students who wanted to enter the University of Botswana in 2001 did not get places. Thus, given such large numbers of

excluded secondary graduates, it is clear that expanding or building more conventional universities is not the solution to increasing access to university education. Instead, open and distance education responds adequately to the needs of these new 'non-traditional' distance learners who now comprise the largest and fastest growing group of those excluded from conventional universities.

Cost Efficiency of Open and distance education.

One of the main reasons why many countries introduce open and distance education is its widely acknowledged cost-efficiency compared to residential instruction. First, for students who are employed, open and distance education lowers the costs of education because there are no opportunity costs, since learners do not forego income from employment in order to study. Learners also do not pay on-campus residential fees.

Second, because of its heavy dependency of part-time staff, open and distance education operates at more efficient staff/student ratios. This does not only reduce the proportion of institutional budgets dedicated to staff salaries because of more efficient staff/student ratios, but also the institution does not meet staff benefits associated with fulltime staff, such as medical aid, pension contribution, gratuity, etc. Furthermore, open and distance education presents further opportunities for cost recovery by shifting costs to employers and households. Third, the use of facilities of other institutions, such as classrooms and specialised rooms, obviates the need to invest and maintain costly physical infrastructure, thereby releasing funds to support teaching inputs and learning activities.

Fourth, open and distance education offers declining marginal costs because the unit cost goes down with increase in student numbers. Murphy, *et al* (2002) report that the unit cost of training teachers through open and distance education is one-third to two-thirds of that for fulltime programmes, while open universities are known to operate at 13% to 73% of the per student costs of conventional programmes. Studies cited by Saint (2000) show the relative cost advantages of open and distance education compared with conventional universities in the same countries, especially among mega-universities that operate at significant economy of scales.

Fifth, the use of modular approach in course development in distance learning contributes to the cost-efficiency of open and distance education. The main advantage of modularised course development is that study materials are easily updated through tutorial letters, addenda, etc. without the need to reproduce them in their entirety. In addition, this flexibility enhances various forms of collaboration, including acquisition of ready-made study materials from other open and distance education providers. This cuts down in production time and course development costs. Course materials acquired from other open and distance education providers through collaboration can be easily modified to suit learners in different contexts, through wrap-around materials and adds-on.

However, these and other efficiency gains should be used to improve the quality of learner support and management of open and distance education. The planning and implementation of open and distance education should take into account several important factors that combine in complex ways to influence the costs of open and distance education, which may include technology, student assessment, face-to-face

tutorials, course development, etc. Finally, the provision of public open and distance education also requires governments to absorb the cost of other capital investments, including major equipment items, vehicles, furniture and computers for fulltime staff and costs of other management functions.

?? What, in your opinion, prevents people from understanding the importance of ODL? Support your view with typical examples.

Improving educational quality.

Not only is open and distance education acknowledged for its unparalleled capacity to increase access to education, there is also evidence that apart from its effectiveness and relevance, it promotes educational quality. Results of studies by Moore and Thompson (1990) and Verduin and Clark (1991) have shown that open and distance education is equally or more effective than classroom instruction when appropriate methods and technologies are used, where interactions between learners are utilized and tutors provide prompt feedback. In addition, distance learning materials are specially designed to promote user-friendliness. They use clear and simple language and content is presented in a logical and coherent structure in order to enhance pedagogy effectiveness. Distance learning also increases effectiveness of pedagogy because it allows learners to re-play the audio or videotape, read and re-read instructional materials and re-play a streamed video of a whole lesson.

Open and distance education is also used to enhance the quality of traditional primary and secondary schooling. According to Moore and Kearsley (2005), open and distance education has been used in Sub-Saharan Africa to improve educational quality in the conventional school system through in-service training of teachers. Prudent use of new technologies, such as Internet, videoconferencing, satellite, and computers, significantly increases access to education and improves educational quality, especially higher education. For example, interactive radio instruction (IRI), which has been used successfully in some SADC member states, such as Lesotho, South Africa and Zimbabwe, capitalises on teacher facilitated activity-based learning to supplement and improve the quality of traditional classroom instruction at primary and secondary levels.

It is axiomatic among traditional pedagogues that interactivity between teacher and student is pivotal to improving educational quality. This truism has implications for open and open and distance education, where a significant proportion of learning takes place with minimal or no interactivity between tutor and learner. The strength of open and distance education in overcoming the distance barrier and enabling learning to take place when the learner is removed from the tutor in time and/or place, also presents the most important potential weakness to good quality education because of diminished to interactivity. To enhance interactivity and improve educational quality, open and distance learning has invested in interactivity promoting technologies, including interactive radio instruction, television, Internet, satellite, videoconferencing, etc.

Costs of mediating the barrier

Since by definition, open and distance education is a set of educational practices which mediates the barriers that exist because of learner–teacher separation so that teaching and learning takes place without time and/or place constraints, there are cost implications associated with mediating the barrier. These costs could be referred to as tutor-learner linkage costs, since they are borne at both the learner and institutional end of the teaching-learning interaction and may include videoconference, online, teleconference, email, fax, face-to-face tutorials, etc.

However, we know that apart from these operational costs, there are also capital costs that are largely borne by the institution. While these capital investment costs may also be factored into cost analysis of open and distance learning, we already know that these are relatively cheaper because of great savings in buildings, through the use of existing facilities, such as schools, universities and other organisations. But given that operational costs are comparable to campus-based instruction, which are borne by most SADC governments through grants, generous loan schemes and scholarships, the question for open and distance education is who should bear operational costs? If these are properly calculated, should governments not explore innovative ways of sharing operational costs with learners and not shun away from their responsibility?

Meanwhile, to get a good picture of the costs of the tutor-learner linkages, it is important to identify key cost drivers, that is, the activities and tasks that drive costs. According to activity-based costing approach, the basic unit for calculating and distributing costs is an activity (Robin, Robert & Kaplan, 1999). An activity can be further broken down into tasks, representing discrete steps carried out to achieve a specific activity. From a cost accounting perspective, activity-based cost analysis requires that we identify all activities to be costed and then place a money value on all corresponding resources that are consumed in carrying out those activities. Broad categories of activities in open and distance learning may include course development, material distribution, course delivery and course management, while resources may include human resources, furniture and equipment, physical and ICT infrastructure.

From the institutional perspective, the costs of distance learning are associated with broad areas of course development, management, and delivery to learners at various locations, through face-to-face tutorials, specially prepared modules, audio and videocassettes, videoconference, online, etc. Major operational activity categories that drive costs for the institution may be loosely categorised to include the following open and distance learning aspects;

1. Development
2. Delivery (preparation and presentation)
3. Interaction
4. Management
5. Assessment

Meanwhile, within each of the five activity categories there are several tasks that could be identified, cascading from an activity. These tasks represent various work steps taken towards accomplishing the activity. In addition, each task has corresponding resources that are expended, such as human resources (academic, technical and support) to accomplish the activity. For example:

Activity: Course delivery (including lesson preparation and presentation)

Tasks: Develop details of course content

Plan tutorial

Identify and gather existing materials (text, readings, media, etc.)

Determine media format

Produce personal hand-out materials

Produce materials with help of Multimedia Department

Materials duplication for learners

Although these tasks relate to course delivery, they may vary, depending on whether they are being undertaken by part-time tutors or fulltime academic staff. For example, where a fulltime itinerant academic is engaged to provide tutorial services to learners, costs may be incurred for additional tasks that may include transport, transport and meals.

Financing open and distance learning

Before reading on, work on this activity.

?? Why do you think financing ODL deserves more attention than what has been happening in your country hitherto?

Given the varied potential benefits of distance education in terms of cost-efficiency, educational quality and access and equity perspective, funding open and distance education becomes an important strategic issue for governments, especially in developing countries where demand for education at all levels often far outstrips resources, such as money, buildings, equipment, qualified and experienced staff. The attractiveness of distance education to developing countries arises from its phenomenal potential to increase access while, at the same time, lowering unit costs or average cost per learner. Therefore, given these enormous potential benefits, it is not surprising that distance education is able to attract funding from varied sources (Rumble, 2006), which include:

- a) government grants and subsidies;
- b) students' fees and other user charges;
- c) community contribution;
- d) sales of materials and other resources;
- e) donations from private sector bodies;
- f) grants from nongovernmental organisations;
- g) grants from international funding organisations;

However, the list provided by Rumble (2006) is not exhaustive, since additional sources may include alumni, individual benefactor, scholarship funds, etc. In developing countries, particularly in Southern Africa, the list could be whittled down to a few major sources that include governments and households, since grants from nongovernmental and international funding organisations are often of a temporary

nature, lasting for a few years.

The sources may also vary between private and public open and distance education. For most private distance education in SADC, households are often the only funding source, while funding sources for most public open and distance education include both public fiscus and households. For example, households represent the only funding source for the Zambia Open University and the Zimbabwe Distance Education College, which are both private providers that do not receive government financial support and subsidies. On the other hand, both governments and households are the major sources of funding for public open and distance education providers in countries such as Zimbabwe, Botswana, Namibia, South Africa and Tanzania.

Government support for the provision of distance education may include financial support for capital costs (buildings, equipment, facilities, etc.), operational expenditure (technology, salaries, utilities, etc.), course development, secondment of staff, scholarships, loans and bursaries, while the contribution of households takes the form of tuition fees and other user charges. Public tertiary distance education institutions may request and receive financial support directly from central government, through the relevant Education Ministry or indirectly through regulatory or funding bodies. Whether the request is made directly or indirectly, the amount of subsidy requested may be calculated using several budgeting approaches such as incremental budgeting, zero-based budgeting or other approaches.

The costs of open and distance learning

From a cost analysis perspective, one could use either an accountancy or economic theory approach to explore and determine the cost of open and distance education. Although it might appear attractive to use an accountancy perspective because this cost analysis framework includes labour, material, capital, operating, direct, and indirect costs, the fact that education (including open and distance education) is considered a quasi-social good, an economic theory perspective provides the focus for determining cost analysis in open and distance education in this chapter. However, this does not mean that an accountancy perspective to distance education cost analysis is not useful.

Direct costs, for example, are relevant and important to open and distance learning cost analysis because they include all expenditure that is directly related to a particular service or product, such as teaching. The costs incurred by ODL institutions on part-time staff that is engaged in developing courses, teaching and marking assignments submitted by learners, represent direct costs because they are directly linked with a specific course. On the other hand, in open and distance education, **indirect costs** (sometimes called **overheads**) represent all expenditure that is related, but not directly attributable, to a specific course only. These include maintenance of offices and utilities. While expenditure on these areas is not easy to link directly to any one course, it is distributed across several courses because it is important in determining the cost of open and distance education. However, both direct and indirect costs, as well as other accountancy cost analysis concepts (capital, operating, etc.), are embraced in cost analysis of open and distance education activities using economic theory perspective.

However, from an economic theory perspective, a most common distinction made in costing open and distance education is between **variable** and **fixed costs** (or operational and capital, respectively). By definition, the latter do not vary with changes in the number of learners or volume of activities and services, while the former are responsive to the volume of activities – that is, they change with changes in the number of learners or activity level. Fixed costs include costs of management functions (e.g. personnel, finance, administration, evaluation, and other support services) and capital (infrastructure) costs, such as buildings, and major equipment items, vehicles, furniture, and computers for management and fulltime staff.

?? In your own words, explain what you understand by: direct costs, indirect costs, variable costs, and fixed costs.

Table 1: Behaviour of fixed and variable costs in response to changes in volume of cost driver.

Cost Type	Cost Size	Behaviour of Cost Driver		Cost Drivers
		Increases	Decreases	
Fixed Cost	Total Cost	Unchanged	Unchanged	management functions personnel, finance, administration, evaluation, other support services
	Unit Cost	Decrease	Increase	infrastructure) costs, buildings, major equipment items, course design and development computers for management and fulltime staff
Variable Cost	Total Cost	Increase	Decrease	course production, tutoring, counselling,
	Unit Cost	Unchanged	Unchanged	material distribution, assessment marking

While fixed costs remain relatively constant in spite of changes in volume of **cost drivers**, variable costs change in response to changes in the volume of cost drivers. Within the context of open and distance education, variable costs include course production, materials distribution, tutoring, counselling, study centres, assessment invigilation and marking, course evaluation, etc., where total cost changes in direct proportion to changes in the number of learners or volume of activity. From Table 1 above, it is evident that a cost driver is a driving force behind a cost and refers to factors or variables that cause cost to occur. By definition, a cost driver may be anything that causes an overall increase or decrease in cost when it increases or decreases, respectively. According to Rumble (1997), a cost driver is anything that causes changes in overall costs in response to changes in its volume. However, from the list of cost drivers in Table 1 above, cost drivers may be classified as either resource drivers or activity drivers, where the former refers to the cause of resource consumption, the latter reflects the activity consumption from final products. For example, the tutorial groups and study centres are cost drivers, because an increase or

decrease in either or both has an influence on the cost of personnel (tutors) to reflect the number of tutorial groups or study centres. Similarly, the number of learners is an important cost driver because it affects the cost of course production, assessment marking, etc. Therefore, cost drivers are important in cost analysis and cost management, because in order to budget and manage costs in ODL, all variables or factors that drive costs for a particular resource or activity must be identified and analysed.

Calculating the cost of open and distance learning

Three other important concepts used in cost analysis of open and distance education are **total costs**, **average costs**, and **marginal costs**. Total costs refer to the sum of all fixed and variable costs. A total cost function of open and distance learning may be expressed as a simple equation.

$$TC = F + (VN)$$

Where TC = total costs

F = fixed costs
 V = variable costs per learner
 N = number of learners

Sometimes cost analysis of open and distance learning may be concerned with the unit cost or the cost of educating one learner or graduate. Thus, by dividing the total cost (TC) by the total number of learners or graduates of a distance education institution, you get the unit cost or average cost per learner or graduate, respectively. Therefore, from the total cost function, a simple unit or average cost (AC) function can be expressed as:

$$AC = TC/N = (F + VN)/N = F/N + V$$

Where AC = average costs

F = fixed costs
 V = variable costs
 N = number of learners

The average cost function shows the responsiveness of distance education to economies of scale, since increasing the number of learners (enhancing access) results in greater cost-efficiency because it drives down the unit cost or average cost per learner.

Although open and distance learning is very responsive to economies of scale, sometimes cost analysts would like to go a step further and determine the cost incurred to produce one more unit of a product or enrolling one more learner on a course. This is important where accommodating one more learner on a course has

implications for making additional provisions that might include printing an additional tutorial letter or module, marking one more assignment, test, examination script, etc. In this case, ODL cost analysts are interested in what is called *marginal cost* (MC), which is defined by Du Vivier (2008) as the additional outlay that is required to produce one extra unit of a product/service or the additional cost attributable to enrolling one more learner on a programme. Marginal cost may be determined by measuring the increase in the total cost attributable to enrolling one more additional learner and may be computed using the following marginal cost function:

$$MC = TC(N+1) - TC(N)$$

Where MC = marginal cost per learner per course
 TC (N) = total cost per course
 TC (N+1) = cost after adding one extra learner

Economies of scale in open and distance learning

The concept of economies of scale is worth devoting a few more paragraphs because it related to both average and marginal cost and also has significant implications on cost-efficiency of ODL. The responsiveness of ODL to economies of scale is such that total costs do not increase in proportion to increase in access. Total costs often do not continue rising in a straight line, instead, they tend to decline in response to increase in numbers of learners. The nature of the relationship between average cost and marginal cost helps in determining whether economies or diseconomies of scale occurred.

However, an understanding of the relationships and behaviours of total costs, fixed costs, variable costs, average costs and marginal costs is essential to explain the phenomenon of economies of scale. Figure 1 below shows that fixed costs (FC), such as the dean's office and course design costs, do not change with increase in the number of learners, since a faculty or department does not respond to increases in numbers of learners by appointing several deans or heads of department (there is always one dean's or HoD's office per faculty or department although the size of the office might marginally grow in response to learner growth). Similarly, the costs of designing a course remain generally constant, regardless of the number of learners enrolled on that course.

Figure 1: Behaviour of fixed costs, variable costs and average costs of DE

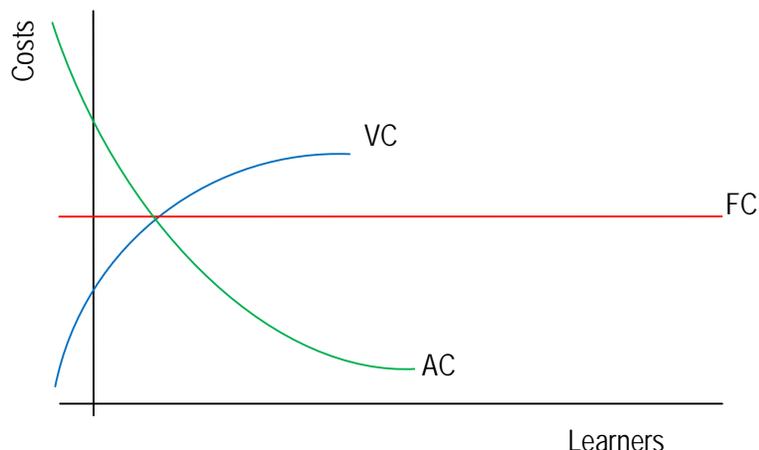


Figure 1 also shows that the behaviour of variable costs (VC), such as marking of assignments, tests and examinations, printing of modules, etc. indicates that these costs vary directly with numbers of learners. On the other hand, the rate of increase in total costs (a combination of fixed and variable costs) tends to level off as the number of learners reaches certain thresholds. This is because it becomes more cost-effective to produce for large numbers of learners than for few learners. In the latter, fixed and variable costs are spread among many learners, unlike the former case where few learners share production costs. The attractiveness of distance education provision lies in the fact that average costs decline with increase in learner numbers – ‘the bigger, the better’ or ‘the more, the merrier’.

The phenomenon in open and distance learning where the incremental or marginal cost of producing one more unit of output of a good or service is less than the average cost is referred to as an economy of scale. On the other hand, when the marginal cost of producing an additional unit of output exceeds the average cost, the phenomenon is referred to as diseconomies of scale. Therefore, the idea in financial planning and cost analysis is to keep the cost of producing one more unit of a product or the marginal cost of enrolling one more learner below the unit cost or average cost, in order to avoid diseconomies of scale.

While the attractiveness of open and distance education in developing countries lies, in large measure, in its susceptibility for economies of scale, which gives it unparalleled potential to increase educational access in more cost-efficient ways and at lower unit cost or lower average cost per learner, it is critical and challenging for cost analysts and financial planners to identify all cost drivers and associated costs for budgeting and resource allocation purposes. How detailed the analysis takes depends on the level of financial planning. For macro-level financial planning, the planner might identify major ODL sub-systems, list down all major areas of activities for these sub-systems and apply activity-based costing approach to identify and tabulate activities or processes and procedures that cause work to be done in order to calculate all costs associated with carrying each activity as indicated in Table 2 below.

Table 2: Cost analysis of open and distance learning by subsystem, area of activity and activity

SUBSYSTEM	AREA OF ACTIVITY	ACTIVITY
Regulatory sub-system	-	salary of institution’s senior executive management
		institution’s board of governors/councillors seating allowance
		costs of strategic planning workshop

		costs of periodic audit of institution
Logistical sub-system	-	recruiting part-time tutors and contracts issuance
		issuing cheques or arranging for bank transfers to pay tutors
		maintenance of the institution's computer network
		insurance for institutional infrastructure
Materials Sub-system	Materials Development	training workshop for course writers
		payments for course writers
		fees/salary for editor
		salary/wages for typist
	Materials Production	costs of pilot-testing materials
		salary/wages/fees for desk-top publishing
		payments for illustrations
		payments for use of copyright material
	Materials Distribution	costs of printing and/or photocopying
		storage of materials
		packaging of materials
		transporting materials
Student Sub-system	Admissions & Registration	communication with those handing out materials to learners
		assessing applications from prospective learners
		capturing registration forms on computer database
	Study Centre of Group Allocation	checking data entry for accuracy and completeness
		checking data entry for accuracy and completeness
		utilities for study centre
		payments to centre administrative personnel
		provision of ICTs at regional centres
	Study	learners regional and study centre allocation
		payments for tutors
		training of tutors
	Assessment	teaching materials (markers, photocopies, etc.)
		fees/wages for marking assignments
		rental of examination facilities
		exam invigilation costs
	Certification	exam marking costs
verifying learner eligibility for certification		
certificates production costs		
		graduation ceremony costs

?? The following four sub systems of cost analysis have been reflected in the table above: regulatory, logistical, materials, and student.

i. Explain the differences between each one.

ii. How does each one influence financing in your ODL situation?

iii. What is the distinction between materials development and materials production?

iv. How is materials distribution linked with materials development in the distance education set up?

This important activity requires that you closely look at each sub system, and define it clearly so that you are fully aware what it entails. Since a typical open and distance learning situation is your baseline, make an attempt to relate it to your day-to-day experiences.

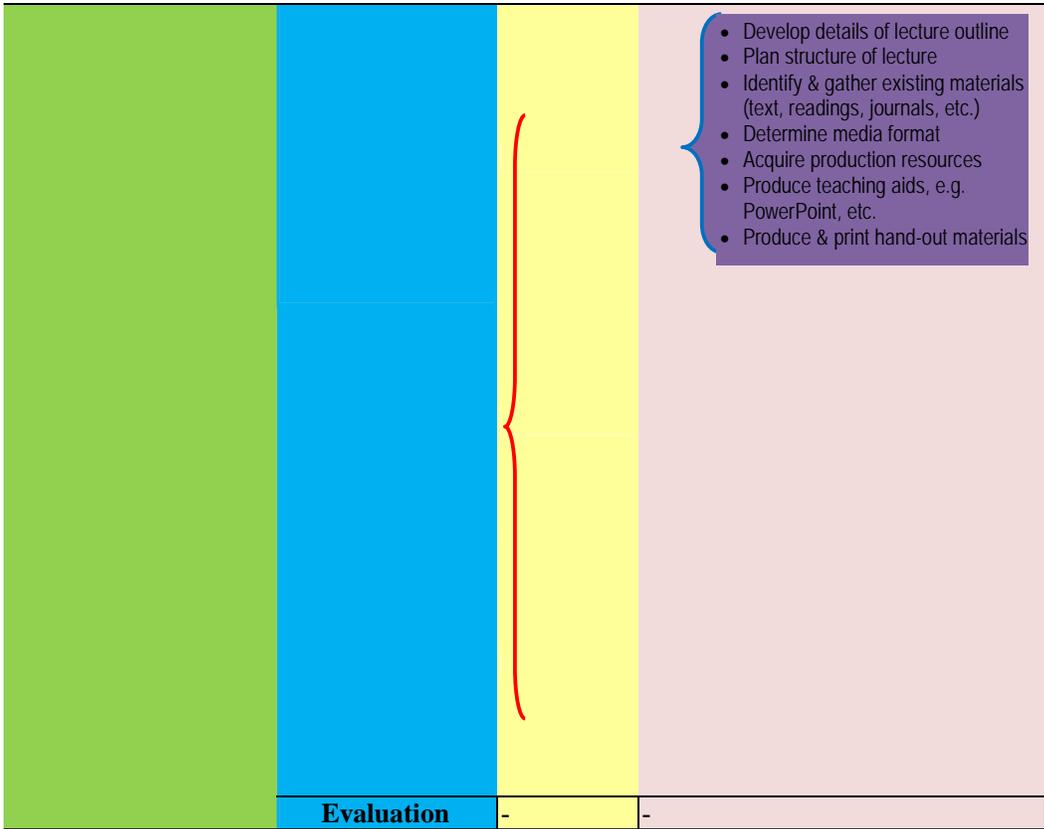
For micro-level planning, a financial planner or cost analyst might opt for a costing approach that categorises unit costs around specific areas of activity or some agreed classification. For example, the five major areas used by Willis (cited by Bart, 2008) for cost analysis and budgeting purposes, which include technology/production support, administrative support, academic and student support services, marketing, and research and development, could be broken down into smaller units of analysis or functional areas. These, in turn, could be broken further down into activities, which could also be further broken down into even smaller units of analysis, tasks. Table 3 illustrates how two of the five major areas, technology/production support and academic and learner support services may be broken down into functional areas, activities and tasks. For the major area of technology/production support, functional and activity aspects would correspond with courseware development and course design and, then, a plethora of tasks, including graphics, audio/visuals, chart room development, content analysis, content design, storyboarding, copy editing and desktop publishing. On the other hand, functional cost areas under the major area of academic and learner support services may include tutor induction, enrolling learners, instruction delivery, plan a lesson and identify and gather existing materials (e.g. text, readings, media), while administrative support may include despatch, staff travel, accommodation, external examiners and part-time staff payment, etc.

Figure 2: Micro-level cost analysis using lower level unit analysis

Major Area	Functional Area	Activity	Tasks
Technology/Production Support	Courseware development	Design course	<ul style="list-style-type: none"> • Planning • Content analysis • Content design • Storyboarding • Graphic, audio/visual production • Instruction • Content review • Copy editing • Field testing and review
	Tutor Induction	-	-
	Enrol Learners	-	-



- Orientation
- Counselling
- Career guidance



Costing may be calculated and grouped differently by different institutions into functional area which, in turn, could be re-classified into several activities, such as courseware development, tutor induction, instruction delivery, course evaluation and learner enrolment. Such groups or categories of costs are referred to as cost centres. Different institutions develop different approaches to costing and, therefore, use various cost centres. As a result, one institution might classify one thing as a cost centre, while the same item might be classified as an activity or task in another institution. For example, course design might be considered a cost centre in one institution, whereas in another courseware would be categorised as a cost centre and not course design. However, what is important is to ensure that all activities that influence expenditure are captured in cost analysis and do feature in budget estimates.

Budgeting

The most elementary definition of a budget could be a statement of income and expenditure prepared in advance of the financial year in which it would take effect. However, there is much more to a budget. A budget refers to a plan that is expressed in financial terms and developed and informed by specific objectives and outcomes that are to be achieved during the plan period. Therefore, a budget is not only prepared ahead of the financial period in which it applies, it takes into account agreed objectives and outcomes that are to be achieved and through which the budget would be used to monitor performance of an organisation towards attainment of the objectives.

A distance education institution often has one master institutional budget that is a consolidation of several budgets representing various operations, including marketing budget, research and development budget, departmental budget, etc. In turn, each of these budgets could also be a master budget of its own, having been compiled from several activity or project budgets. For example, a department could have as many budgets as the programmes or as the number of courses in the department.

Purposes of a budget

While it might appear tedious to prepare a departmental budget down to the level of a course, this is worth the trouble on account of the importance of the purposes of a budget, which may include communication, coordination, planning, control and evaluation.

1. **Communication** – Budgeting could be used to promote communication within an institution. For example, management could use budgeting as a strategy for communicating and sharing institutional mission and goals with subordinate units and promote alignment of departmental and project objectives with broad goals so that resource allocation is consistent with institutional priorities. On the other hand, participative budgeting provides departmental heads the opportunity to communicate and share departmental goals and justify resources needed to achieve these goals.
2. **Coordination** – The collaborative and cross-departmental nature of many distance education activities, encourage different departments and units to communicate with each other and share information during budgeting process. For example, it is not uncommon distance education for academics in one department to be involved in the

work of another department or a teaching department to collaborate with multimedia department on course development, etc. In such cases, a budgeting process provides a strategic platform for coordinating efforts and allocating resources required to accomplish joint objectives between and among departments and units.

3. **Planning** – Since a budget is a plan expressed in financial terms and prepared ahead of a plan period, many strategic questions are asked and answered and decisions made. As a result, the budgeting process provides opportunity for interrogating old plans and work processes. During the planning process, decisions are made on whether to discontinue some activities, while the way in which some tasks were performed in the previous financial year would be reviewed to determine if they are still the most effective and efficient ways. Given the limited nature of resources, planners and decision makers often grapple with questions concerning prioritisation of activities and tasks to be undertaken during the plan period. In addition, critical resource allocation decisions are made during the planning period on how best available resources are apportioned and what additional resources might be required to accomplish strategic institutional, departmental, and unit objectives.
4. **Control** – An important purpose of a budget is financial control. Once a budget has been approved, it gives the budget holder the authority to spend within the budget and, as may be appropriate, the responsibility to raise the specified income. Therefore, a budget provides a framework through which income and expenditure are monitored constantly for variations throughout the financial year to determine whether operations are still on target. Constant monitoring is critical to organisational performance because it allows pre-emptive and remedial action to be taken promptly to ensure that performance remains on target. Through the budget, a budget holder has the responsibility to seek ways of controlling expenditure and using resources efficiently in order to avoid over-expenditure and costs overruns.
5. **Evaluation** – A budget also serves as a tool for evaluating a budget holder to determine performance. The organisation would like to know whether performance targets were achieved and whether it was done within the budget. It is the responsibility of a budget holder to achieve targeted goals and also ensure that it is accomplished within the limits and constraints imposed by a budget's projected income and expenditures.

?? Five purposes of budgeting have been discussed above. Explain the importance of each one in the administration of a budget in an ODL organization.

The budgeting process

Of the two major components of a distance education budget, income and expenditure, the latter is the more difficult to calculate and analyse because some cost elements may be either missed out and not included in the budgeting exercise or inaccurately calculated. A budget should provide an exhaustive list of all projected revenue and expenditure for a given operational period. It is, therefore, important to analyse and determine all costs and revenues carefully in order to determine the total costs and revenue of a course, programme, department or institution. However, any

projected expenditure for the financial plan period (financial year) that is missed out or miscalculated will have more deleterious effect on the budget. The challenge faced by most financial planners when preparing budgets in developing countries is the absence of basic data regarding unit costs and the costing of courses (Perraton, 2000 & Tertiary Education Council, 2008).

Since the practice in many institutions is that the finance department is independently responsible for the budgeting and cost analysis function, academic staff that is directly involved in course development, such as course managers and programme coordinators, is not required or expected to submit a budget with every proposal for a new course or programme. As a result, academic staff often is either unable to undertake cost analysis for budgeting purposes and/or has very little or no understanding of course costing. However, when such staff is required to submit budgets, often they end up doing so with little or no technical guidance and support. For example, staff may not know standard cost drivers, tasks or activities associated with the development and delivery of courses they manage. The Commonwealth of Learning sponsored study conducted by SAIDE (South African Institute for Distance Education) (2004:25,27) attests this level of ignorance when it concluded that:

Some of the staff with whom we engaged never considered their own time in terms of the cost to the course, assuming that as full-time employees they are simply part of the overheads of the institution. In addition, most of the staff with whom we engaged work on multiple courses and do not keep timesheets: this meant that having estimated how much time it would take to complete a particular task, they were often not able to see whether the resulting calculation (e.g., time spent on course design) was realistic or not ... Generally our sense was that many programme and course coordinators still need to be empowered with planning and budgeting tools and expertise. There also needs to be a concerted effort by institutions towards activity and course-based costing.

Preparing an annual budget, whether for a course or institution, may be bewildering unless guidance is provided on how to manage the process. Budgeting models provide an important way of presenting a framework for preparing a budget but do not provide the steps required in budget preparation. Often institutions prefer one model over another for various reasons. The following sections overview three budgeting models, which are in common use among many ODL institutions

1. Incremental Budgeting (IB)
2. Performance-Based Budgeting (PBB)
3. Zero-Based Budgeting (ZBB)

Incremental budgeting

This is not only a very simple to understand approach that also requires easy and uncomplicated computations; it is probably the most common approach of preparing budget estimates. Incremental budgeting uses data from budgets from previous financial years, often called historical data, as a basis on which incremental additions or subtractions are made to every budget line. Incremental budgeting may use the estimates for current financial year or actual expenditure for previous financial years as the base on which incremental amounts, determined using some assumptions, are

either added or subtracted in order to accommodate increases or cuts to the budget for coming financial year. For example, the assumptions may include a 2.5% increase in salary budget line to offset expected inflation increase by the same amount or a 1% cut in salary budget line, as result of anticipated layoff of fulltime staff and cut in study centres.

Apart from ease with which budgets are prepared using incremental approach, another important advantage of this budgeting approach is that it produces reasonably stable budgets that are relatively easy to predict because the changes, from year to year, are small and gradual in nature. In addition, by prescribing or providing guidelines to departments on the overall percentage to be cut or increased, it provides departments the flexibility to make adjustments to various budget lines within given guidelines. However, a major disadvantage of the incremental budgeting is that it is based on explicit assumption that the current or previous budgets' level of funding is correct and could be relied upon to forecasting funding for the next financial year, whereas it may be either too high or low for activities of the plan period. Incremental budgeting might also inhibit innovation or the introduction of new activities and courses and programmes that may require significant changes in funding. Unfortunately, using historical data as a basis for funding the same activity in the coming financial year may erroneously assume that expenditure for the previous year represents the most cost-efficient way of undertaking the activity and, hence, takes away the incentive to reduce costs by exploring more cost-efficient ways of doing work. Where this might not be the case, incremental budgeting encourages inefficient and unwarranted use of funds towards the end of the financial year, simply because it there or because they fear that they might lose it in the current or next financial year.

Performance-based budgeting

The financing of tertiary education in much of Sub Sahara Africa (SSA), and especially among Southern Africa Development Community (SADC) member countries, is highly dependent on public revenue allocations through ministries of education and/or higher education regulatory or funding bodies. Public financing of higher education under conditions of diminishing public revenue sources has led to growing demands for more efficient use of public revenue and greater accountability. This has led to budget reforms towards incentive-sensitive approaches such as performance-based budgeting.

Performance-based budgeting (PBB) approach is best suited to public-sector environment where income from user fees will never be sufficient to fully offset expenditure. PPB relates costs to educational inputs so that the budget both reflects and is tied to attainment of specific measurable educational outputs, such as number graduates, etc. Instead of listing what the institution requires for course development or salaries of tutorial staff, PPB presents planners and financial decision-makers with the number of graduates that a given programme is going to produce and the resources that would be required to achieve the target. The targets may be quantifiable, e.g. graduates, or difficult to measure, e.g. improved quality of education. However, this information is made available to planners and decision-makers at the ministry of education or higher education regulatory bodies that use it to make decisions about funding that should be allocated to accomplish targets, which may be short- or long-term in nature. Therefore, PPB requires detailed cost analyses

to be undertaken using appropriate costing tools, such as activity-based costing, to determine estimated costs of accomplishing the targets.

The major elements of performance-based budgeting process include;

- Educational outputs, which may be quantifiable (e.g. quadrupling number of graduates) or difficult to measure long-term goals (e.g. improved quality of rural education);
- Detailed strategies and plans for realising the outcomes (e.g. increasing face-to-face contact, introducing e-learning and other interactive technologies, etc.);
- Detailed cost analysis of activities and services that would be provided towards attainment of the final outcomes (e.g. the cost of increasing face-to-face contact from two hours to four hours per course, three times per semester).

Zero-based budgeting

Unlike Incremental Budgeting (IB), which uses historical data as the basis for budgeting, Zero-Based Budgeting (ZBB) assumes that everything is new; hence, it uses zero as the basis for preparing budget estimates for the following year. Budget preparation using ZBB assumes that all systems, operations, and activities are new and, therefore, should be justified and evaluated from scratch, using tools such as cost-benefit ratios or some other evaluation tools. ZBB shifts the burden of proof to budget holders to justify why they should spend on a given activity or item and why they should spend what they are asking for.

According to Zero-Based Budgeting approach, all activities to be budgeted must be defined in terms of what is called 'decision package', which refer to a document comprising the following key elements

- a proposed activity, e.g. design a course,
- goals and objectives of an activity,
- benefits are expected,
- how performance will be measured,
- all costs that are to be incurred in undertaking the given activity, and, finally,
- list of all alternative courses of action considered and why they were rejected

Zero-Based Budgeting approach comprises the following four main steps

1. **Generation of a 'decision package'**. This is a critical step which involves identifying an activity, such as designing a course, and then systematically analysing it and documenting the results of the analysis in order to enhance decision making. Since information contained in a decision package document assists decision making at higher levels, it should be clear, logical and convincing. Therefore, a decision package often contains information which includes the name of the activity, its goals and objectives, all costs associated with undertaking the activity and all benefits that accrue from carrying out the activity. In addition, appropriate evaluation tools should be used to provide evidence that other alternatives were considered and that the selected activity offers the best choice, given its goals, objectives, costs, benefits, etc. This process forces a manager or budget holder plan thoroughly, undertake cost-

benefit analysis or use similar evaluation tools and, above all, look for most cost-effective ways of carrying activities.

2. **Prioritisation of decision packages.** This step is a logical follow up of the preceding step. Once a manager or budget holder has finished preparing a decision package, this is submitted to a higher or central planning office where costs are reviewed and decision packages prioritised or ranked according to their relative importance and relevance to the mission and goals of the faculty (if submissions are from departments) or institution (if from faculties).
3. **Allocation of funds.** The last and, perhaps, easiest step is the allocation of funds to decision packages. The allocation of central resources is normally for those activities that not self-funding. For these activities, the allocation follows the rank order of decision packages. Where central funds are not adequate to fund all activities, no further decision packages would be approved as soon as the funds are exhausted.

?? Explain the distinction between performance-based budgeting and zero-based budgeting.

Budget administration

When a budget has been approved, it gives the budget holder the authority to spend within the constraints imposed by the budget. This means that the budget holder has to plan how to incur and manage expenditure. Therefore, a budget provides a framework through which a budget holder can constantly monitor income and expenditure for variations throughout the financial year to determine whether operations are still on target. For ODL institutions that rely on government funding, there is need to be familiar with government financial management systems and align activities with the flow of income from government. Some government financial management systems may require funds to be released on quarterly basis, while some ODL activities (e.g. bulk printing of learning materials) are concentrated at some point during the year. Therefore, unless there is alignment between income flow and expenditure, inflexibility in government financial management systems may easily constrain the efficiency and effectiveness of the operations of an ODL institution.

Sound budget administration requires careful planning, preparation, and implementation of work plans for each approved activity. There is need for someone with responsibility to ensure that funds for a given activity are not only available at the time the activity is to be undertaken, but that approval is granted before expenditure is incurred for that activity. Often it is the responsibility of the budget holder to coordinate budget expenditure and exercise control by approving all requests to spend money. Therefore, budget coordination and control function is

important to sound budget administration.

Constant monitoring is critical to budget administration because it allows pre-emptive and remedial action to be taken promptly to ensure that expenditure does not exceed estimates. It is the responsibility of the budget holder to ensure that funds are not only used for the purposes for they were budgeted, but also that they are used efficiently and in accordance with set financial standards and norms. Some of these may control how funds from one line item or vote may be transferred (also called virement) to another budget vote.

Finally, sound budget administration also requires the preparation of a monthly statement of expenditures that would be used by budget holders to monitor and compare expenditures against estimates, so that corrective measures could be taken promptly and not wait until the end of the financial year when it might be too late to remedy the situation. Central financial office may also audit all accounts, as part of internal checks, in order to detect and prevent losses that may arise due to mistakes or misuse of funds.

Challenges

The following are some of the challenges faced I the funding of ODL.

- a. There tends to be a lack of understanding about the purposes of ODL and what it can achieve.
- b. Many governments do not set aside a budget for ODL, instead ODL has to share what is allocated for education generally.
- c. In many cases there is no understanding of the cost of ODL.
- d. There are concepts of budgeting that are not understood by practitioners and policy makers regarding ODL funding. One of the good examples is the notion of economies of scale, which is critical for funding purposes.
- e. Institutions seem to have difficulties appreciating the different types of budgeting and how budgets ought to be administered in ODL.
- f. The lack of national ODL policies in different countries accounts for some of the misconceptions about funding in ODL.

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CHAPTER 14

Open and Distance Learning Management and the Law

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Some Questions

1. Do open and distance learning education managers understand the law as it pertains to their field?
2. What is law?
3. Why is the understanding of the law of education critical for ODL practitioners?
4. What are the potential consequences of ignoring the law of education in ODL practices?
5. Why should ODL practitioners be concerned with the law of education?
6. What are the sources of the Educational law?
7. What is the rationale for knowing the natural principle of justice in ODL?
8. How is the principle of natural justice applied?

Introduction

Distance education (DE) institutions comprise mostly practitioners, managers and learners. Managers are responsible for the overall running of the DE institution's affairs such as the instructional and learning delivery, resources, practitioners, learners' academic conduct and welfare. The public expect DE managers and practitioners to have sufficient professional knowledge and experience to manage all matters that are brought to bear on their institutions (Stewart, 1998). Professional knowledge includes open and distance learning management and the law. As part of their overall professional knowledge DE managers and practitioners should have sufficient understanding of how educational law relates to the development and deployment of open and distance learning. Understanding of educational law in this case means having a working knowledge of the various sources of law and Acts that relate to decisions which affect open and distance learning (ODL).

However, in most countries in southern Africa, Botswana included, there is no literature available yet to indicate any evidence of adequate preparation of DE managers and practitioners for the extensive and increasing range of responsibilities that the public expects of them, particularly with reference to educational law and ODL. Lack of training in the aspect of educational law and ODL is a serious handicap in the management of DE institutions given the growing impact of the law on educational policy and practice.

able to different SADC countries, *begin with reference the*

?? What are the origins of the Botswana Law?

The historical legal context

Botswana was a British Protectorate and as such, British rule meant that a foreign legal system was introduced and practised during the protectorate period.

The foreign legal system that was introduced and continues to be practised is the Roman Dutch Law, as it was in force at the Cape Colony on the 10th of June 1891 and as amended by statutes from time to time and interpreted by the courts (Otlhogile, 1994). This therefore implies that Botswana has a dual legal system, that is, Customary Law and Roman Dutch Law. Customary Law is the indigenous law of Botswana and it governs the lives of the majority of the people.

The concept of law

?? What does law mean to you?

After expressing your view, read what follows and see if that agrees with what you said.

Quansah (2001) acknowledges the fact that the definition of law can be complex. Nevertheless, according to Squelch and Bray (1998) and Oosthuizen (2003), law is a system of rules that serve to create order in society in a harmonious way. The law reflects the shared values of the majority of the population. The law is built on a value system, which unites society, and if it does not, people quickly lose their belief and confidence in the system and a crisis of legitimacy may result (Squelch and Bray, 1998; Oosthuizen, 2003). Law governs human behaviour or conduct. It should be obeyed by all in the society, hence it is enforced by state organs and so if one disobeys or ignores the law, one may be prosecuted and punished or may be ordered to compensate the party that has been injured (Unisa, 1999).

Law is a very broad discipline, with many sub-disciplines. Hence it has been classified by various authorities including Quansah (2001), Squelch and Bray (1998) into several branches. The mentioned authorities have classified law as national and international. The latter involves both Public and Private International Law whereas the former is made up of Indigenous Law, Public Law and Private law. The last two are further divided into more branches of law. Public Law is further divided into Constitutional Law, Administrative Law and Criminal Law, whilst Private Law is divided into other laws such as, Law of Contracts, Law of Persons, Family Law and Property Law.

?? How does Educational law fit within the broad classification of law?

Given the above classification of law, one may wonder how educational law fits in. Squelch and Bray (1998) and Oosthuizen (2003) point out that, educational law is a hybrid field of law that embodies principles from various branches of law. They also state that educational law can however be considered as part of Public Law given the fact that the state is involved and has an authoritative position in education. According to Squelch and Bray (1998) and Mbatha (2000), public law and administrative law govern education law, since it deals with relationships between government and people on a matter that is of benefit to society as a whole. Other areas of education law are governed by private law, particularly in the field of negligence.

Constitutional law is also involved in that all issues touching individual rights and in particular students' rights are taken care of in education. In Botswana the state is responsible for regulating education matters (Education Act, 1976). In the light of this therefore, education law falls mainly within the sphere of Public Law, since education law includes constitutional law and administrative law.

?? What are the functions of law in society?

Law has a very important function in a society. According to Quansah (2001) and Oosthuizen (2003), law has a number of functions, which include the following to:

- maintain social order;
- protect interests;
- protect rights of property;
- protect rights in respect of your person; and
- regulate transactions.

Education Institutions, including DE providers, as social entities can only achieve their missions provided social order exists in their premises and interests and rights of individual stakeholders are protected, hence the importance of Educational Law.

?? What constitutes Educational Law?

Strope (1984) states that Educational Law is made up of constitutions, legislative enactments, court decisions, governing board policies, agency regulations, and coaches' rules. He further emphasises the need for an educator to know the law since ignorance of the law is not an excuse. This view is also shared by Stewart (1998) who states that while principals do not need law degrees, they do need, and are expected to have, an appropriate and adequate knowledge of those aspects of school law that impinge on their professional responsibilities.

Educational Law in Botswana is made up of the Constitution of Botswana, the Education Act and other regulations made by the Ministry of Education and Skills Development. Educational Law is fundamental in Botswana's education system. It governs and regulates the relationships in the education sector. It is therefore a very important part of the law in Botswana. The management of educational institutions relies heavily on what the law of education says as made by Parliament, the courts, the Minister of Education and other delegated bodies and individuals. However, the Constitution of Botswana remains the supreme law of the land that protects fundamental rights of all people, distance learners included.

The protection of fundamental rights and freedoms of the individual as entrenched in Botswana's Constitution has the strongest possible legal force in areas of maintaining learners' discipline. Education institutions are, for example, given a high degree of latitude in the management of learners' behaviour. However, learners do not give up their individual rights while they are at an education institution. Hence the need to consider the importance of protecting their rights within education law as a field (Mbatha, 2000).

Mbatha (2000) further cautions heads of institutions when he points out that Courts generally recognise the necessity of imposing discipline, and as such in the context of today's rights conscious society, education authorities need to balance the necessity of maintaining discipline with the rights of learners such as the requirement for "due process" when trying cases.

It has been observed by Oosthuizen (1998) that the environment of the modern day educator, especially educational management, is an involving one. The educator is involved in a network of relationship with parties that include amongst others, parents, the general public, learners, the state as employer and the employee's organisations. All these parties entertain the same objective of teaching and learning. However, there are substantial potential areas of conflict. The major conflicts that have been noted include amongst others the fact that:

- each group has its own interest in the learner;
- each group has a measure of independence in its area of competency and this creates the possibility of encroachment on mutual areas of competency; and
- generally, people are becoming more and more critical and no longer accept state decisions without question.

Given the above considerations, the law of education is therefore applied in order to solve and regulate these particular conflicts satisfactorily and to create a basis for harmonious co-operation for the sake of the learner's progress .

Oosthuizen (2003) concurs with Squelch and Bray (1998) that the function of the law of education is to provide a secure educational environment in which the learner may develop. They further argue that the law of education regulates the rights and obligations of the interested parties equitably and also contributes to the creation of harmonising patterns of co-operation amongst all participants.

The law of education creates a clear framework for the roles of the education managers and educators as professionals, and it interprets the given statutory positions to establish workable structures for educational management and administration. It provides the structures and guidelines for educational management and establishes the authority of the educational manager and educators. In an education institution therefore, learners should be taken aboard during the formulation of those rules that are meant to regulate order. Such a step helps to cater for the best interests of learners within the educational environment.

?? What are the duties and responsibilities of an education manager heading an institution?

Basically in Botswana, the education manager heading an institution has duties and responsibilities set out in the Education Act (1967:72-73) and these include the following:

- development and good management of the institution as an educational entity; for all aspects of its organization; and for the better discharge of those responsibilities.

- the power to enforce rules by all reasonable means and to exercise control and supervision over other members of staff.
- the day-to-day administration of the institution.
- preparation of a prospectus relating to the practical arrangements of the institution for each academic year, setting *inter alia*, the dates on which the term begins and ends.
- compiling and maintaining a code of rules on subjects of hygiene, deportment, discipline and dress;
- compiling an annual report on the progress of the institution at the end of each academic year;
- calling regular meetings of members of staff in order to discuss with them internal affairs, and keep minutes of such meetings;
- day-to-day expenditure of the institution, cause proper books of account to be kept of all the money received; and
- furnish such financial information relating to the institution as may be required by authorities.

Squelch and Bray (1998:87) concur with the above duties and responsibilities and further include the following:

- drafting policies and rules;
- staff development;
- educational control;
- educational budget; and
- managing the curriculum.

Having discussed the duties and responsibilities of the heads of institutions above, it is important to note that for heads of institutions to be effective in their administrative and leadership roles they need to know the sources of educational law they apply so that they can make quick reference to it and be safe from possible litigation.

Sources of educational law

?? What are the sources of educational law?

The educators' knowledge of the law as it affects learners emanates from a number of sources. In the United States of America sources of law include Congressional legislation, Supreme Court decisions, Lower courts, local statutes and ordinances (Sametz and Mccloughlin, 1985). All these provide both guidance and parameters for heads of institutions and educators.

In Botswana there are a number of sources of Educational Law. These include the Constitution, Legislation, Common Law and Customary Law (Quansah, 2001). All these sources of law prescribe what education authorities can possibly do. It is the duty of each education authority to know the law as it pertains to managerial practice since ignorance of the law is no excuse. The courts expect education authorities, including those in charge of DE institutions, to know the law. The courts do not tolerate education authorities who do not know what the law says.

The Constitution as the source of Law

In Botswana the main source of law is the Constitution. The Constitution is very important when it comes to educational management, teaching practice and discipline. Chapter 2 of the Constitution contains an entrenched and enforceable Bill of Rights. The Constitution's fundamental human rights section emphasises human dignity, freedom, security, privacy and administrative justice. These aspects of the Constitution are the basis of an institution's discipline policies (Squelch and Bray, 1998). Other than the Constitution, Legislation is another important source of Educational Law.

Legislation as a source of Law

The principal source of education law is found in the different forms of Legislation. Legislation is described as the written legal rules drafted by a competent organ of state (Oosthuizen, 1998). Dingake (1999) points out that legislation refers to laws passed by parliament, often called parliamentary enactments or statutes. For instance, the Education Act, the University of Botswana Act and BOCODOL Act are some of them. He further states that Parliament often delegates the power to make laws or regulations to Government Ministers, local authorities and other public bodies. Delegated legislation is more often authorised by statute, and is used mainly to add details to primary legislation, which may only lay down general principles. What this implies for education is that heads of institutions have a legal duty to make rules that are within the primary legislation framework, which is the Education Act. The Education Act has sections that deal with institutional discipline, punishments, suspension and expulsion.

Institutional rules constitute a particular form of subordinate legislation, that is, a code of conduct for learners. Institutional rules are those rules, which control order and governance within the sphere of activities of a particular institution. These are aimed at regulating the mutual act between students *vis-à-vis* the school as an organization, and students *vis-à-vis* educators. Institution heads have a duty to keep educators, learners and the community informed about rules and regulations concerning discipline and punishment (Oosthuizen, 1998) and (Squelch and Bray, 1998). Another source of law is Common Law, which I explained below.

Common Law as a source of Law

Common Law is not enacted by Parliament and as such it is non-statutory. Common law is made up of a considerable body of unwritten law, which exists alongside statutory law that is written law. Common law developed through historical events or custom and is found in the works of legal writers and in case law. Botswana common law like that of South Africa developed from Roman-Dutch Law and English Law.

Common law that originates from decided cases in the High Courts gives us the general legal principles such as the *ultra vires* doctrine, which is applied to determine whether a person has exceeded his or her powers. It also spells out the test for negligence, which requires the "reasonable person" test. Amongst other principles in common law are the rules of natural justice (*audi alteram partem rule*), in *loco-parentis* and *stare decisis* (Wyk, 1983; Squelch and Bray, 1998).

Common law gives heads of institutions and educators certain powers to discipline learners. These powers are derived mainly from the fact that the heads of institutions are regarded as acting in *loco-parentis*, that is, in the place of parents. This means that in the absence of parents, the heads assume certain rights and responsibilities such as supervision and discipline of learners. The common law principles that relate to the powers and duties of heads are:

- In *loco-parentis* principle;
- *Ultra vires* doctrine; and
- *Delegates delegare non potest* principle.

In *loco-parentis* literally means in the place of the parent. This common law principle enables heads to exercise certain authority over learners who are placed in their care. However, this does not mean that the heads of institutions replace parents' responsibility. Parents are still the primary educators and retain full responsibility for their children (Wyk, 1983; Squelch and Bray, 1998).

The *ultra vires* doctrine is mainly concerned with the validity of the institutional head's managerial acts. It simply means beyond the legal authority (Wyk, 1983; Squelch and Bray, 1998; Oosthuizen, 2003). In other words, an act is *ultra vires* if the authority had no power to act, if he or she had the power, he or she acted in a manner not permitted or authorized. For example, an institution head performs an act which is not within his or her powers, such as when he or she expels a learner when only the Minister of Education is empowered to do so. In the light of this explanation, Bray further argues that, an act will be deemed *ultra vires* if it were performed:

- in an unreasonable manner, for example, where the results are unreasonable;
- in bad faith, that is with bad motives;
- with an ulterior purpose, for example, the teacher being transferred for the wrong reasons, for instance being demoted; and
- on the basis of irrelevant considerations, for example, when the facts of the case have not been properly examined even if such an act fell within the empowering legislation.

Actually the *ultra vires* doctrine goes further than the mere question of whether an act is performed within the framework of the prescribed legislation. The *ultra vires* doctrine requires that all the legal sources pertaining to the act must be complied with (Wyk, 1983, Squelch and Bray, 1998; Oosthuizen, 2003). This therefore implies that the act must be performed within the parameters of the law, particularly the Constitution, Legislation and Common law principles. To illustrate a broad sense of the *ultra vires* doctrine, Squelch and Bray (1998) further argue that in terms of education legislation, a head of institution is empowered to suspend a learner pending investigation into alleged misconduct. However, when the head, for example, suspends a learner maliciously such as without planning to institute an investigation into the alleged misconduct, or suspends a learner because he or she wants to frighten the learner that is abusing his or her authority, then the act of suspension would be *ultra vires*.

The Common law principle of *delegates delegare non potest*, according to Squelch and Bray (1998) and Oosthuizen (2003) literally means that a delegate cannot sub-delegate his or her delegated powers. This however, does not mean that sub-delegation cannot take place. Practically, it means that a person with delegated

powers may not sub-delegate indiscriminately. In this instance, the head of an institution is clothed with authority, hence has many discretionary powers such as:

- a discretion on what type of punishment is administered to a learner, for instance suspension; and
- a discretion on whether to draft the institutional policy or delegate to a committee.

In some instances a head cannot use his or her discretion to delegate because only he or she, in terms of his or her office, or legal status as head and expertise can perform an act like suspending a student.

A head of an institution derives his or her position of authority from the law, that is, from the Constitution and Legislation especially common law and case law principles. In Botswana such power is derived from the Education Act or the Act that created the institution, for example, the BOCODOL Act or the University of Botswana Act. This has resulted in heads of institutions having discretionary powers, that is, legal competencies (powers and duties), which allow the bearer of discretion to make a choice within the parameters of the law (Wyk, 1983; Squelch and Bray, 1998). It therefore means that heads of institutions should be conversant with the law in order to use their discretionary powers within the parameters of the law otherwise learners' legal rights would be trampled upon. The discretionary powers mean that the heads of institutions are powerful as long as they remain within the law. They are empowered with administrative act duties hence their knowledge of administrative justice is the basis of legally sound institutional management (Squelch and Bray, 1998).

However, the institution head's powers are not unlimited. There are two major common law principles that regulate a school head's actions. These are the principles of natural justice and the principles of reasonableness and fairness and these are very important for maintaining discipline, order and harmony.

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- a. What is meant by the principle of natural justice?
- b. How is the principle of natural justice applied?

The principle of natural justice

The principle of natural justice in the ordinary sense refers to a process of giving a fair hearing to an accused individual. It is simply the duty to act fairly. It demands that a party must be heard before the case against him/her is determined. *Even His Almighty God gave Adam a fair hearing in connection with Adam's consumption of the forbidden fruit* (Dingake, 1996: 43-46). Dunklee and Shoop (2000) concur with Dingake and argue that the right to due process of law is therefore the cornerstone of civil liberty and that it guarantees fairness for all citizens.

A fair hearing is done by affording the individual an opportunity to tell his or her side of the story and by ensuring that no one becomes a judge in his own case. Dingake (1996:29) argues that such a due process is a fundamental principle in Botswana law and that bodies or persons like heads of institutions with legal powers cannot validly exercise it without first hearing the person who is affected by the decision arising out of the exercise of legal power. He further makes it clear that the right to a fair hearing

in Botswana has been stated in a series of decisions handed down by courts that it is now settled that an administrative body or public official such as a head of an educational institution, who disregards it, runs the risk that the court will set aside such a decision as a nullity. The courts insist on hearing the other side so that one may have a balanced view of things before taking a decision. This is aimed at avoiding taking arbitrary decisions in matters affecting public affairs.

According to Squelch and Bray (1998) and Oosthuizen (2003) the principles of natural justice must be observed before certain administrative decisions are taken. They further explain that in the education context the principles of natural justice require that a learner must be given the opportunity to put his or her case. Another requirement is that any consideration, which may count against a learner concerned, must be communicated to him or her to enable her or him to defend the issue effectively. The head of an institution is also expected to give reasons for the decision he or she makes and to be impartial. The head must be impartial and free from bias. This is the *nemo iudex in sua causa rule* (Oosthuizen, 2003). It actually implies that if a head suspends a learner after a fair hearing and a learner appeals against the decision, the head may not also hear the appeal, that is, the head cannot be a judge in his or her own case.

The principle of natural justice is a rule that the courts require to be observed. One legal suit in Botswana's court showed how a school head failed to apply the principles of natural justice. This is the Masunga Senior Secondary School case, that is, EM, OG, BM and NB v Attorney General and Clement Jorosi (Briscoe, 2000). The court held in favour of the students citing the legal principles that the students had not been given a fair hearing and as such the rules of natural justice had not been followed. This was as a result of the school head's failure to apply the rules of natural justice before recommending to the Minister to expel the students. The Botswana Education Act Section 28(1) stipulates the conditions for suspension, exclusion, expulsion and withdrawal of pupils. It also states all the principles of natural justice. The principles of natural justice are, therefore, important for managing learners and staff. In short the principles of natural justice require a fair hearing, that is, absence of bias. A fair hearing is an element that is traditionally expressed in the Latin maxim *audi alteram partem*, that is, to hear the other side. Critically important within the law is also the principle of reasonableness.

The principle of reasonableness

?? What does the principle of reasonableness entail?

Heads of institutions are also expected to apply the principle of reasonableness. This principle means that actions and decisions taken by the school head must be reasonable and that policies, rules and regulations must be carried out in a fair and just manner (Oosthuizen, 2003).

As far as expelling students is concerned, the court in the Masunga case that was quoted above, the judge also found that the expulsion was not reasonable and was not carried out in good faith hence the appeal case also failed. This therefore means that heads of institutions should know the rules of administrative law. These rules require

that disciplinary action against learners involving suspension or expulsion shall proceed according to certain minimum standards and procedures. The need to know the law is further emphasised by Smith and Colon (1998) when they point out that heads of institutions must know the law, for their failure to do so may result in expensive and time consuming litigation. They further encourage heads of institutions to focus on key laws and understand these thoroughly and keep abreast of special court decisions.

Challenges

Several challenges regarding education and the law are faced in Botswana, and arguably, the same challenges may also be experienced by educators and administrators in other SADC countries. The following are some of the challenges:

- There are very few studies if any in Botswana that address the issue of the Law and Distance Education.
- There are no distance education managers who are trained in ODL and the law.
- The lack of awareness of the role of the law in ODL affects the management of ODL delivery as learners' rights disregarded when it comes to the development and delivery of programmes and services.
- There is dire need to provide sound orientation and training in the area of educational law as it pertains to ODL.
- The lack of studies imply that research into educational law in ODL should be carried out as a matter of urgency in order to increase the level of awareness and understanding the law as applied in educational settings.

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