Independent Distance Learning – is it worth it?

An approach to the management of the development of IDL

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Abstract

This paper describes an approach to the management of the development of independent distance learning programmes (IDL) adopted by the University of Sunderland. The University through its Faculty of Education and Society has had significant success over many years of delivering a small number of programmes through IDL and this paper shares some of the areas that need to be addressed as more pressure is brought on programme deliverers to adopt the IDL approach. The paper goes on to explore the financial considerations, including the 'at risk' costs and the possible rewards. It is intended to act as a step-by step briefing for non-academic managers of the considerations necessary from idea to implementation, stopping short of delivery. It takes the perspective of, and its intended audience is, the managers of the process – there are many other papers and guides that deal with the distinctive pedagogy of IDL in depth and similarly many written by and for academic staff.

Introduction

The University of Sunderland, through its Faculty of Education and Society has for some years operated highly successful programmes of study at undergraduate and postgraduate levels entirely at a distance and throughout the world. These programmes allow students to operate independently of each other, at a distance from the teaching team and working at their own pace. In the early days of their operation, these programmes were delivered on paper – a pack of course material was posted to the student. Later, this became more streamlined through the use of material provided on CD and latterly on-line through virtual learning environments.

These programmes are by no means unique – many, many providers adopt this approach which in this country is well exemplified by the Open University. This paper examines the differences between the needs of IDL and those of traditional approaches and highlights some of the steps and considerations necessary as thoughts turn to converting programmes of study from traditional delivery to IDL.

The push towards IDL is from two directions: the convenience for students and the lower delivery costs. This paper does not concentrate on the issue of student convenience – this is dealt with elsewhere – instead we consider the cost issues. However, we would note that the premise of Redpath (2012) and many others who show that despite the insignificant difference in academic results between similar programmes of study, academic staff are still slow to accept IDL as an equivalent approach. Carnoy et al (2012) show that the convenience for students is significant, especially in adult learners. Neither do we examine programme overhead costs in detail, whether these are for the university or the students taking the programme. The infrastructure costs for most students undertaking higher education programmes are relatively insignificant now, the availability of infrastructure being far more widespread and much cheaper than the early studies of a few years ago, for example Oliver (2001). We now see the growth of 'MOOCs' – Massive Open Online Courses – which take for granted access to materials and support networks. The UK Open University which is the largest provider of IDL in this country has recently announced their initiative *'Futurelearn'* which is '*intended to rival established providers in the US*' (THES, 2012). Instead, this paper concentrates on the considerations and costs of the ***development*** of independent distance learning via on-line platforms.

The genesis of this paper was in part to convince this university that it would be worthwhile challenging academic bias towards traditional approaches and seriously consider the move to IDL where it is academically appropriate at a time when students signing up to online education is projected to increase significantly (Allen & Seaman, 2007). The intention of the university is not to move 'wholesale' to on-line IDL activities – we see much value and advantage on traditional 'face-to-face' delivery for those students who prefer it and for those programmes where such delivery is seen to be better. Instead, the university wishes to consider the real implications, including the costs, of developing such programmes. After all, "…cost analysis (direct, opportunity, and indirect) are critical to long-term program sustainability and future growth" (Betts & Sikorski, 2008).

Throughout this paper the following term and their meanings are used:

- ***tutor*** means a higher education teacher providing educational input for a group of learners in a lecture, seminar or tutorial context;
- ***traditional*** is used to describe a learning interaction between learner and tutor that is largely or completely 'face to face', that is in the same room together at the same time;
- ***independent distance learning*** abbreviated to ***IDL*** is used to describe a learning interaction that is not 'face to face', where the learner is expected to follow a study guide which is delivered to them on paper or through electronic means and through this means will be guided to learn the same material, skills and competencies as would be expected through traditional learning interactions.

The Pedagogy of Independent Distance Learning (IDL) - overview

Perhaps the most significant consideration when moving towards IDL programmes from traditional delivery is the change in pedagogy that is necessary. Careful consideration must be given to the 'skillset' of the academic staff available. It is now well recognised that the pedagogy of IDL is significantly different, and the days of "just converting" a traditionally delivered course to IDL are gone. Indeed one of the earliest references to these differences can be found almost 40 years ago (Rockart & Scott-Morton, 1975). Much has been written since and reference is made to some later in this paper, but these tend to be written by academic staff for academic staff and so tend to be less than fully understood by non-academic managers in universities. There is, therefore, a relatively poor understanding in our experience of the need for significant development in academic staff to take on the 'new' approaches by those who steer the resource allocations. It was to clarify such resource needs that this paper was commissioned by senior managers at the University of Sunderland. It is interesting to note that while there are several papers available that consider the 'risk' costs associated with development of IDL (for example Allen & Seaman, 2007) these focus on factors such as staff attrition rather than the opportunities that can be gained through changing pedagogical approaches.

Step-by-Step briefing

The following designed as a briefing for managers who must allocate resources or decide strategy so that they understand the steps involved in the design and production of an IDL programme of study. It is not meant to be a step by step guide that could be followed by an academic team.

First thinking – the idea

The genesis of idea behind the development of a programme of study to be delivered for independent distance learning might come from a variety of sources. It could perhaps be a new opportunity the market for which would not be appropriate for traditional delivery, or it could be that a market for an existing programme has arisen that, again, could not easily be delivered via a traditional approach. Either of these prompts could lead to the suggestion that the programme be considered for IDL. Care should be taken, however, that the programme is suitable for delivery though IDL – not all programmes are, and market forces must not override the absolute need to maintain a good student experience and pedagogy appropriate to the subject. Academic staff will provide the 'checks and balances' that need to be considered alongside market forces.

Sometimes it may be that the market for traditional delivery has disappeared and the only way that the programme can be continued is by changing the delivery approach to capture a larger market. In our view the marketplace must not be an overriding force, overcoming academic 'sense' and if the market for traditional approaches has fallen to make the programme of study unviable, yet the alternatives are unsuitable, then the brave decision of terminating the programme might be the better course.

A slightly different 'driver' could be the thought that the programme could be improved by an IDL approach. Many programmes that have been developed for traditional delivery because that approach was the only one available at the time could, perhaps, be converted to IDL or a blended approach where traditional and IDL approaches are combined. If this is the driver, one wonders why it has taken so long to realise this, but nevertheless such a driver should be taken seriously.

Great care should be taken that a new market really does exist. Questions should be asked about where the market intelligence has come from. Has a 'proper' market research approach that is valid and reliable been used, for example. The cost of the development, as will be shown later in this paper, is significant and embarking on such a development activity should not be undertaken without clear evidence that it will 'pay off'. Similarly, questions should be asked about whether this new development will challenge existing programmes and reduce their recruitment, perhaps even to the point of unviability. If the answer to this question is 'yes' that might not in itself be a reason to stop the development – lower deliver costs might make it worthwhile, but the question needs to be asked.

At this point, the issue of available resource needs to be raised. There will need to be a development team set up, and this will probably have to come from existing staff. Do they:

- have the spare capacity to undertake the development;
- have the subject knowledge necessary; and
- most important of all understand the pedagogy of IDL?

The last of these is very important indeed and the most overlooked – we will cover this in much more depth later – but at this 'first idea' stage in the development there is no point continuing unless all three of these questions have a clear "Yes" as the answer either from the existing staff or clearly identified elsewhere.

In our institution, all the questions posed above are asked relatively formally through the faculty committee structure. Asking the questions in a formal forum ensures that there isn't a similar development going on elsewhere (it has happened!) and that someone has considered the questions – it is very easy for a large team to think that the questions have been asked and answered satisfactorily by 'someone' when in fact they have not. A further set of questions asked at this point are around the 'business plan' for the development. At this stage at our institution this is in outline only since a detailed plan cannot be written until the development team has decided the best way to go forward, but an idea of the fee chargeable and the overall costs of the programme delivery (including administrative overheads) is worthwhile getting. Once the committee is satisfied with the answers to these questions "Permission to Proceed" is given and the team can start work. A number of development ideas fail at this point, but they fail because they would probably not succeed later; and those that get through this stage have every chance of success.

Pre-development

The pre-development stage is probably the easiest, since thinking through the ideas will already have made implicit suggestions for this part. In our view, the most important decision is who should lead the development. We tend to designate this person the Programme Leader, since the title fits quite well within the understanding of the university processes (for example, there is a field for such a name in the administrative system). Sometimes the programme leader for the development hands over to someone else for the delivery; the important point is that someone is recognised as leading the development – what they are called doesn't matter so much.

In a modular scheme a series of module leaders will need to be identified. This can be more problematic than it seems since it is likely that modules already exist that would be suitable for inclusion in the programme. There might need to be some negotiations around conversion of these to IDL or decisions made to run two parallel instances of some modules. Either way, the modules leaders need to be brought on board since in most institutions these people will be the subject experts and will have the most academic content contribution to offer the development team.

There will also need to be a team of writers to develop the material and resources that will be used by students taking the programme of study.

All members of the development team – the programme leader, module leaders and all the writers – will need to be conversant with the needs of IDL pedagogy. The programme and module leaders might not need to be *fully* conversant nor experienced but they do need to understand the differences between traditional pedagogy and that needed for effective IDL delivery. The team of writers, of course, need to be completely competent with IDL pedagogies. There is an interesting discussion to be had around whether the writers need to be competent IDL pedagogues *and* experts in the necessary subjects – we have seen many instances where a competent IDL writer can take instruction from a subject specialist and produce a very effective programme. However, in our view it is better to make the subject specialists into competent IDL pedagogues first even if experienced IDL resource writers are also on the team.

IDL versus Traditional approaches – the pedagogical considerations for development

It is necessary at this point of the briefing to consider the differences in pedagogy between traditional and IDL approaches. Much has been written on this subject and this paper does not intend to replace or even to summarise these. Instead, we offer a briefing so that managers can understand the differences between the two pedagogies under consideration. This briefing is based on the work done by CEVU (2001), Pelz (2004) and Rosenthal (2010) who postulate several *Pedagogical Principles* that differentiate independent distance learning from traditional learning. We have adapted these lists somewhat in this briefing for managers to offer a smaller number of principles, combining some and leaving others to the pedagogues who must deliver them:

- There is a shift from Teaching to Learning, in that with traditional pedagogies the tutor in the classroom tends to take the lead and "teaches" their class. The interactions in the traditional approach, even if student centred, are still orchestrated by the tutor. In IDL, there are very few synchronous interactions – if there are any at all they will be asynchronous. The learning is wholly controlled by the student and must be guided by the materials and resources provided by the tutor. The tutor's role becomes one of support.
- Student Centred approaches are used exclusively in IDL. There can be no Tutor Centred approaches in the traditional sense because the tutor is not present, so the pedagogy must be wholly student centred.
- Learning must be self-directed by the student. This is, of course, why proponents of IDL would say that IDL is a superior pedagogy. We would not necessarily support that view, but it is certainly different. Self-directed learning is one of the huge strengths of IDL in that the student can undertake learning at a time and at a pace that suits them, rather than that which suits the class or the tutor. However, this means that the material and resources must be accommodating enough to allow such flexibility.
- In order to undertake IDL, there must be development by the learner of 'Generic Competencies'. These include basics such as access to the materials – not always straightforward when they are delivered on-line; research skills; academic self-discipline and so on. With traditional pedagogies, the tutor can monitor and guide students as they develop the necessary skills – in IDL it has to be part of the programme of study.
- It is likely that there will be an element of interactive learning where students will utilise facilities provided such as on-line discussion boards. While it has been shown that there is no correlation between success and the level of interaction (Song and McNary, 2011) there is little doubt that there is benefit to students in being able to discuss difficulties and work in general with students and staff – this is true for either pedagogy. The skills needed for effective use of discussion boards, however, are not always well developed in distance learners and this can lead to a feeling of 'falling behind' by those who do not swiftly acquaint themselves with the approach. As shown above and in our experience this feeling does not necessarily transfer through to poorer performance but it can lead to dissatisfaction with the course.
- Given that IDL students are often located in different countries from the lead university, it is necessary to be aware of international and cultural communication issues. An obvious example is the time zone difference which can adversely affect perceptions of asynchronous response rates. However and more importantly, cultural differences in learning can be exacerbated for IDL students who do not have the moderating influence of other students around them. The materials and learning guide must make allowances for these cultural differences to ensure that they do not disadvantage the students.
- The learning style for IDL is ***active*** and not passive as can be the case with traditional pedagogies. That is not to say that traditional pedagogies do not promote active learning – at their best they should. However, passive learning is almost impossible in the IDL approach. Students cannot be expected to adopt

active learning styles without help (although some will); it must be promoted, encouraged and even required by the materials provided via the programme resources.

- Finally, consultation with external parties is always worthwhile at this stage. As well as students who have taken pre-existing traditionally delivered courses *and* similar courses through distance delivery, employers should be consulted and care should be taken to ensure that in-country considerations such as the different cultures are taken into account.

These principles all have to be incorporated into the learning materials. This is where the idea of 'converting' material used to support traditional approaches to learning into those for IDL can fall down. Often the material for tradition delivery will have been written with the assumption that face-to-face support will be available, that the cultural differences between learners will be moderated by a classroom setting and that spoken conversations will be held between course participants as the course progresses. None of these things will pertain in the IDL setting and to incorporate them during some sort of conversion process is very difficult. In our experience it is often better to start from scratch and completely re-write the materials.

Construction of the learning environment

This step is about the platform or delivery method. Originally IDL materials would be delivered on paper, more recently they would be delivered on CD or video and now everything (almost) is delivered via on-line platforms such as virtual learning environments (VLE). While the platform itself will almost certainly be provided by the university, the *environment* itself will need to be constructed within the platform. Most academic staff are now well acquainted with their university's platform and the rules of 'house style' that pertain in the context, but there are other things to be aware of.

The development team needs to be co-ordinated so that the programme itself has a style that students will be able to work within. There is no point having the various parts of the team 'doing their own thing' and setting their modules up in their own way if this means that students have to re-learn navigation and terminology as they move from module to module. Unlike traditional approaches there is no introductory and familiarisation session at the beginning of each module's teaching – it's all done through the material presented on-line. This means that the level of co-ordination offered by the programme leader is very important. Equally, there might be a need for interaction between modules, particularly if these are running concurrently – this needs co-ordination too.

The additional functionality offered by the platform will vary according to the VLE in use and the way in which it has been implemented at the institution. All VLEs offer a means of delivering content to the learner, but most will also offer means of hosting discussion between participants. As has already been mentioned, Song and McNary (2011) show little difference correlation between academic achievement in the programme of study and participation in on-line discussion boards but they agree with Neal (2011) that the 'comfort' generated within students of being able to communicate

with other course participants is well worthwhile. In our experience it is advantageous to make use of discussion boards if they are available, but their use needs to be co-ordinated and 'starter questions' need to be offered across the various concurrent modules. This needs careful co-ordination.

Write learning material

Finally the team can get down to writing the materials. Non-academic management staff will probably recognise this part but some might not recognise or understand the necessary preparation to get to this stage. The important point that we are making is that old adage "Poor Planning Produces Poor Programmes", and management teams must understand that the time taken to get to the beginning of the writing stage is not just a worthwhile bonus, it is an essential part of the process. But if all that preparation is done, the next stage of the process is relatively straightforward.

A writing team, which might include external educational copywriters, can now be put together who can plan the delivery and support approaches; get together as module teams and liaise with each other; and can research the material required. They can then get down to writing the material using the appropriate distance-learning pedagogies, locating and lodging resources (including dealing with IP issues). They can construct assessment approaches and the method of assessment and then write the assessments which will probably be 'coursework' type since the logistics of examining or time-constrained testing are difficult in a widespread IDL context. The overall programme leader will need to check that continuity and progression of learning is taking place as intended within concurrent and consecutive modules.

We advise strongly that the material and approach is tested on focus groups in as accurate a way as possible. In our view there is little point bringing a focus group together to try out materials – that is not the way they will work in practice. Instead, we recommend that a test environment is set up and people are asked to try it out at home, on their own; perhaps coming together later for discussion of how it went for them.

So how much does this all cost?

An intention of this paper is to consider what the development costs are. The notion of *Working at Risk* is relatively new to programme development in UK higher education but it is a concept well understood by those who write research bids and the term has been used in commerce for years. In short, it is the investment of resource into a project without any real certainty of return on the investment. One would be hard-pressed to find a better example of *working at risk* in academia than the development of IDL programmes. The development costs, as will be discussed shortly, are very high and if the programme fails to recruit the losses can therefore be high. However, we will show later what the potential is for covering the risk since the delivery costs are very low in comparison with traditional approaches.

The following figures are estimates based on the following:

- a brand-new programme with no traditionally delivered programme on which to base materials;
- modules of 200 hours student learning time;
- 2012 costs of staffing, including on costs.

And do ***not*** include costings for

- overhead recovery or contribution;
- discussion with other teams (unlikely);
- input from central services such as the library (very unlikely);
- university and faculty quality processes (such as approval events);
- consultation with external organisations or people.

1. Team leadership and co-ordination – about 15 hours per module by an experienced academic middle manager. About £525.
2. Writing of materials for each module – about 150 hours of experienced academic staff per module. About £4,500.
3. External consultancy – for example copywriters, per module. About £650.
4. Administrative support for the writers, per module. About £200.
5. Non-staffing costs per module. About £350.

This gives a total ***per module*** of about £6,125 on development alone. A full year's programme of modules of this size would be six modules, giving a total for each year of the programme of about £36,750 – over £110,000 for the development alone of a three-year undergraduate degree programme. This is very much a 'ball park' figure and is probably a minimum which can easily be inflated if, for example, the writing team needs to absorb the learning platform system first. The figure can be inflated hugely if external IDL copywriters have to be engaged.

In the current economic climate of UK higher education, one wonders why an institution would expose itself to £110,000 or so of at risk working. There are several answers to this, most of which have been covered above. However these are mostly educational advantages which although academically sound will often not sway non-academic managers in universities. So what are the possible financial rewards?

The financial rewards.

At the University of Sunderland the linkage between streams of income and related expenditure is always under scrutiny. The option to maximise the use of resources, whether in terms of staff, equipment, buildings, infrastructure or business systems remains at the forefront of our thinking and is embedded into strategic and corporate planning.

The benefit of an IDL business model over the traditional approached have been made clear above, but in addition there are benefits of this approach over partnership models which are often the approach used for traditional delivery overseas. With the IDL approach there is a direct relationship between the University and the student. There are no payments to third party deliverers to consider. This makes a significant differential when considering IDL development costs against forecast income.

A recent business planning exercise gave the following result for one IDL programme (one-year full time) which has comparable traditional and IDL approaches, with the 'contribution' figures indicating the difference between income and direct costs that can be used to provide supporting infrastructure and services costs in the university. In this example, the IDL activity is about half the size of the traditional delivery approach, but the contribution is much higher. Other programmes see similar returns, although the direct comparisons are more difficult to make.

	Income	Delivery costs	Contribution	Contribution %
IDL	£1,400,000	£560,000	£840,000	60%
Traditional	£3,200,000	£2,400,000	£800,000	25%
Total	£4,600,000	£2,960,000	£1,640,000	36%

The above table clearly shows the differential and IDL's ability to recover the development costs. Clearly as stated earlier in this paper, the need to identify an IDL market opportunity has to be paramount, but the financial rewards would appear to be there.

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