

CHAPTER 6

Learning development: Change through collaboration

6.1 Introduction

The development of the sample course demanded structural changes in services provision, changes in the roles of support staff and a shift in understanding of the development and support of quality learning opportunities. A collaborative process was needed in order to foster these changes and to infuse the organization with the spirit of these changes. This chapter will provide some background to the Unisa production system, a suggested development process and examples of change achieved through such a process.

6.2 Rethinking learning development

The introduction of the sample course resulted in the identification of several problematic characteristics of the institution that prevented the system from being able to fully recognise the course and its delivery needs. These problems may exist and continue to exist due to the fact that learning development processes have not been sufficiently directed towards critically analysing current practice and informing the system in order to effect ongoing change. Feedback from the two pilot deliveries of the sample course (as explained in Chapters 4 and 5) made it evident that learners and staff had become alienated from one another and that the print-based system was responsible for a degree of stagnation in teaching practice (See *Recommendations* and *Executive Summary* in *A report to the Unisa Senate* attached as Appendix B). Staff have also become alienated from the system in that they are unable to influence change successfully. The following institutional characteristics were identified:

- Continuous reflection on and refinement of Unisa's current print-based delivery is needed to prevent stagnation in practice.
- The commitments of the online facilitator are overwhelming compared to the current print-based practice — this may be due to the lack of continuous critical reflection and feedback on current practice.
- Change, innovation and improvement of teaching practice and support services are not rewarded or recognised by the system.
- The learning development process does not inspire development and change towards reform of practice and systems.
- Online learning provision is not sufficiently organised and structured to provide proper support and to build appropriate capacity.
- Assessment methods are mainly based on multiple-choice-based automated assessment or venue-linked examinations — these methods do not appear to be successful in all cases.
- Learning development processes should be of such a nature that they inform technical and support departments well in advance in order to prepare and build capacity.
- Communication between learners and the institution needs to be improved and such communication should be efficiently enabled through Internet communication technologies.

It was a struggle to develop and deliver the sample course in the context of a restrictive teaching, support and administrative culture. In this section the production and delivery process is assessed in terms of the characteristics provided by Champion (1995, p. 193-194) and Raggat (1993, p. 22). Three production cultures were identified:

- Fordism - low product innovation, a rigid development process and low labour responsibility;
- Neo-Fordism - high product innovation, a less rigid development process and low labour responsibility;

- Post-Fordism - high product innovation, a flexible and inclusive development process and high labour responsibility.

At the start of this research project the researcher had the job description of an instructional designer. In order to elaborate on his role as an instructional designer at Unisa, it is useful to define ‘instructional design’, discuss text authoring and print-production, and to elaborate on the role of the instructional designer in the course development team as it was historically constituted. This discussion is informed by the procedures and solutions developed by the development team of the sample course.

6.2.1 Fordist learning production

Historically (at Unisa) learning development (instructional design) and production was done in a linear and compartmentalised process where the sharing of information and cooperation did not stimulate critical thinking towards quality distance learning. It was a cycle in which the development and production process supported the economies of the institution. This section will provide more information on the pre-1994 production culture of the institution and the role of the instructional designer in the process.

Defining instructional design

Moore and Kearsley (1996, p.102) provide a very ‘production oriented’ definition:

Instructional Systems Design (ISD) consists of some recognized standard procedures that are used to develop well-structured instructional materials... The fundamental principle of the ISD approach is that all aspects of learning and instruction should be defined behaviorally, so that what the student is expected to learn can be measured, and teaching can concentrate on the student’s observable performance.

According to this definition standardized procedures of production aim at behaviouristic objectives. The role of the teacher is minimised to observing pre-specified performance. The danger exists that such a correspondence DE production system with well-developed product specifications may produce text-based packages that relate more to print production *per se* than to a complete quality learning experience. The learning experience can only be that which the production system allows. If the development of such packages are further founded on economies of scale (serving greater number of learners with less intervention) then text production may become the core business. Prior to the attempts at innovation in the 1993-1994 period, Unisa had received critique for the quality of the learning experience based on texts without support (Peters 1989).

Distance education and text production

Evans and Nation (1989b, p. 241) discuss the views of Walter Perry who was an advocate of the team approach and who assigned a more substantial role to the educational technologist (instructional designer) in the UK. In this regard Evans and Nation (1989b, p. 242) were of the opinion that ‘educational technology had a considerable influence on the development of teaching methods of the OU. Consequently, the University can be seen as a pre-eminent example of instructional industrialism...’ This was a course development and production system that was developed where academics were responsible for content, educational technologists had to advise on course design and materials development, while the British Broadcasting Corporation prepared radio and television programmes. These developments seemed to have compartmentalised the role of team members in order to produce learning packages. They also reported on the concerns highlighted by David Sewart in this regard. He warned about the possible overemphasis on teaching packages in the university — producing the perfect package of material could be equated with quality teaching at a distance. According to Sewart (in Evans and Nation,

1989b, p. 243) the balance should never swing towards such a teaching package... and there must always be appropriate forms of 'human services' available.'

Evans and Nation (1989b, p. 243) used the term 'instructional industrialism'. In such a production culture, learners would receive learning packages as passive receivers of knowledge while an increasing distance developed between those who authored and produced the materials and the learners at the receiving end. This process is labelled as 'text production' (Evans and Nation 1989b, p. 245). Distance teachers would then be writers of courses and not teachers of courses in such a delivery environment. Distance teaching and learning can thus be equated to the industrial production of text. Institutions, systems and staff take on the divided and compartmentalized nature of industrialised production with alienation as a strong characteristic: 'The separation of teacher and student, the disempowerment of students from making decisions about their own learning, the requirements of production schedules, postal dispatches and the many other aspects of working in distance education, spin an intricate web around the teacher in distance education.' (Evans and Nation 1989, p. 246).

The alienation of learners and teachers from one another in the Unisa context was confirmed by the evidence provided in Chapters 4 and 5. Learners confirmed that their print-based studies consisted of 'a textbook, a rush and exam'. In addition, they perceived the institution as distant. Chapter 5 provided evidence of a struggle to be successful in the online learning community as teaching commitments were severely challenged by learner participation. It was apparent that Unisa teaching staff were still mostly 'knowledge tellers'. The teacher found himself or herself 'programmed' by an industrial print-based development, production and delivery environment — in general the 'product' left the desk of the author and never evolved into a mediated learning experience. The role of teacher was reduced and he was alienated from the learners. Teachers felt exposed in a new teaching environment like the OLC — they felt incompetent and deskilled.

Farnes (1993, p. 13) highlighted this low level of responsibility with ‘workers’ and the inflexible development process in a Fordist production environment. Within such a production environment the instructional designer (educational technologist) would assist with the packaging of knowledge as course curricula. They would represent the requirements of the system and would not necessarily be the advocates of good learning during the development process. The texts produced have their own requirements driven by a restrictive production and delivery process leaving no room for innovation in DE learning and no opportunity for the instructional designer to challenge the system sufficiently to accommodate such innovation for the benefit of the learner.

Instructional design at Unisa

According to Van Aswegen et al. (1995, p. 10) course design and development was traditionally (prior to 1994) the exclusive province of the academic departments, with the assistance of an editor on completion of the writing process. This meant that during this phase of instructional design, or course production, texts were produced exclusively by academic departments. They were then fed into the production system that started with the editorial department. The team approach was absent — the benefits of collaborative planning and application of expertise, as well as the experience of the instructional designer acting at least as a course text expert, did not enrich the development process. Learning experiences were produced in a large-scale industrial production environment. Traditionally, therefore, when writing course material, the Unisa lecturer was expected to be a:

- Subject specialist;
- Instructional designer;
- Expert in assessment techniques;
- Typographic and layout specialist.

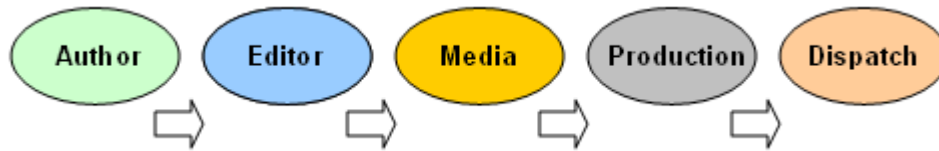
According to Booyse et al. (1995) this was too much to expect of lecturers who were appointed primarily for their research and subject expertise. It is not clear why they were not also appointed for their teaching skills if there were no proper tutor systems in place at this stage. This is in opposition to the Open University of the United Kingdom (OUUK) where the tutor teaches, marks assignments, compiles examination papers and marks scripts, provides general student support, presents discussion classes and does research, leaving the academic to fulfill a coordinating role.

Text design and delivery at Unisa was only supported by the delivery of discussion classes in major urban centres, but this benefit was available only to those resident in urban areas. In addition the quality of such discussion classes cannot necessarily be linked to the initial instructional design of the course texts. Nevertheless Booyse et al (1995) regarded the course texts produced by academics as ‘substantively good’, but they admitted that they tended to be deficient in instructional design and presentation.

There was a reduction in the mandates, roles and responsibilities of key stakeholders in the learning development process as a result of economies of scale-based text production at Unisa. The instructional designer could not engage in innovative design, the lecturer became an author and lost his or her teaching responsibilities and the production process became one of compartmentalised responsibilities as Sewart and Evans and Nation warned (discussed in the previous section). The instructional designer became an agent of the system, assisting clients (academics) to package content according to the requirements of the production system. It is not a very responsible role and instructional designers did not strive to assure innovation towards quality learning or the challenge of the system in order to accommodate new learning and teaching requirements.

The following figure displays the dominant linear Fordist production process at Unisa:

Fordist production of study material



6.2.2 Neo-Fordist efforts

The staff at the University of Michigan define instructional design as follows:

Instructional design is the systematic development of instructional specifications using learning and instructional theory to ensure the quality of instruction. It is the entire process of analysis of learning needs and goals and the development of a delivery system to meet these needs. It includes the development of instructional materials and activities, and tryout and evaluation of all instruction and learner activities (The University of Michigan 1996).

The characteristics of ‘systematic development’ and ‘process’ also labelled instructional design as a production process. But then the definition stresses effort towards a holistic and inclusive approach to instructional design. In the definition there is migration towards the team approach.

Introducing the team approach

From 1992 to 1993 the Bureau for University Teaching (where the instructional designers were eventually appointed) started to work with academics, editors and Unisa Press in an attempt to improve course development. The Bureau supplied the ‘coordinating agents’ (or the instructional designers). By 1994 the team approach to course development had been used on an experimental basis in a number of faculties. In 1995 this

innovation was further strengthened by study visits to the Open University of the United Kingdom (OUUK) and the Open University of the Netherlands (OUN). Both these institutions employed the team approach. The aim of the visiting teams was to gather experience from these two institutions in order to reform the Unisa course development process. Both visits produced interesting results as reported by the respective teams. Booyse et al. (1995, p. 6) provided the following rationale for implementing the course design teams at the OUUK:

- Courses were produced more effectively by pooling resources and expertise.
- Discussion and mutual critique were stimulating to enhance quality — because some team members were not academics, a diversity of viewpoints entered the design process.
- Team members could specialize and concentrate on areas that they enjoyed.
- Individual team members did not experience isolation and lack of support in the production process.

The inclusive course team at OUUK consisted of the following members: a course chair, the course manager (project manager and member of faculty), academic authors, an editor, graphic designer, BBC producer, course secretary, critical reader, external evaluator, computing experts, project officers, educational technologists, and research assistants. The team reporting back from the OUN (Van Aswegen et al. 1995, p. 9) stated that at that institution courses were developed in multidisciplinary course teams composed of subject area specialists, educational technologists, delivery specialists, and other specialists as determined by the team if and when deemed necessary.

The ideal of flexibility of teams was mentioned in the OUUK report depending on need (Booyse et al. 1995, p. 8). However this could mean that a team could consist of one or two people and that the real objectives of course development

teams would not be reached. Nevertheless, with such a rationale, and so much perceived similarity, the advocates of the team approach at Unisa felt fortified. The members of the visiting team went on to list benefits of the team approach to the study package as follows:

- Integration of didactic presentation, media selection and graphics for a user-friendly presentation, appearance and format;
- Texts written in a language accessible to students;
- Integration of reading, writing and study skills with course material where necessary;
- Taking cognizance of the student's total learning environment;
- Built-in student support in the presentation of the study material;
- Quality assurance principles (formative and summative evaluation by peers and students) that guide total design and structure.

These benefits may be facilitated by different team members, but may not be a natural consequence of the team approach (the implementation of the team approach at Unisa did not eventually lead to all of these benefits). It certainly promised to relieve academics as subject or discipline specialists from having the sole responsibility to author course texts as was the case at Unisa. Within the team it would be possible to 'harness' the individual lecturer's expertise, resulting in more effective study packages. Booyse et al. (1995, p. 8) went on to say: 'A course development team would seem to be the obvious solution to the Unisa lecturer's problems, if a model appropriate to the local situation could be developed.'

The development process

At the OUUK course development was organized on a project basis — the relevant faculty designated a course chair and course manager who coordinated the development of each course. The course manager acted as project leader of

the course development project and was responsible for the creation of the course. In a similar scenario Van Aswegen et al. (1995, p. 7-8) reported the process of course development at the OUN:

- Preliminary research and the planning phase (content and didactic design of the course, costing, course plan, approval);
- Elaboration phase (plan given concrete form);
 - Writing materials (instructions received from course team – authors start writing);
 - Audio-visual production (according to course plan);
 - CAL productions (according to course plan);
 - Multi-media productions (integrated use of audio-visual and computer programmes);
 - Tutoring plan (study guidance plan - all contact with students recorded into the tutorial plan, and training activity/introduction included with the plan);
 - Examination (examination to be available as soon as course is available);
 - Developmental testing (interested students selected and study the draft version of the course for comments and adjustments);
- Production phase (physical production of course components);
- Implementation phase (last measures to get course running – briefing and training of tutors);
- Exploitation phase (teaching-learning phase – data collected in order to revise or discontinue course).

The visiting teams gave prominence to the project nature of course development at the OUUK, and to the very thorough and inclusive process at the OUN. But neither process was properly implemented and administrated when the team approach was finally accepted at Unisa. Because of this there was a possibility that important elements of a quality learning experience may

not have received proper attention and that they remained underdeveloped as a result (eg some elements of the elaboration phase such as a tutoring plan, developmental testing, and the implementation and exploitation phases were not implemented). This was especially evident with elements of student support and communication.

The OUN had probably achieved more of an integrated approach (Van Aswegen et al. 1995, p. 12) in this regard as the learning package did not merely contain texts. Each OUN course consisted of a self-contained unit. It was accepted, as the point of departure, that a study package should be sufficient for a student to complete the course successfully. Accordingly, the maximum possible amount of tutorial support was built into the basic structure of each OUN course. The course structure was based on an interactive didactic approach and comprised directions for study, study aims and self-tests, supplemented by specific instructions, examples, questions and self-assessment assignments, all designed around the basic study material. Nevertheless, additional study support, regarded as supplementary, was offered in various forms, most of which carried an additional cost component. These most important forms of additional study support can be summarized as follows:

- A mini-course on study skills;
- Study centers (supplementary study and student support);
 - Information center (information on courses and support);
 - Counselling services;
 - Tutors (with introductory or starter courses – after hours tutorial sessions on regular bases);
 - Lectures (ad hoc lectures/discussions on all courses by central academics);
 - Student interaction (informal student study groups at centers);
 - Central academics (individual tutorial support where there are no tutors – email, correspondence, phone);
 - Marked assignments and feedback.

At the OUUK the basic learning material or study packages were supplemented by student support delivered by approximately 7500 part-time tutors and counsellors at approximately 300 regional offices and student centres. Support took the form of face-to-face tutorials, correspondence teaching through tutor-marked assignments, individual contact and compulsory summer schools (Booyse et al. 1995, p. 11).

The conclusions drawn from the above in the report to the visit stated that the essentially student-oriented approach of the OUUK was in harmony with changes taking place at Unisa. Certain elements of the OUUK model could be incorporated into a flexible model of student support for Unisa. These elements should at least include readily available group-based and individualized support for learning and study related problems at decentralized learning centers. Unfortunately these elements, which formed the core of student support and tuition, were neglected at Unisa. The report on the OUUK visit (Booyse et al. 1995, p. 8) also warned about dwindling resources which could enforce different economies. Unisa wanted to cut less effective courses (with smaller numbers) thereby enabling lecturers to concentrate their creative energies on more selective offerings. Therefore economic rationalization caused a stronger emphasis on economies of scale and when dwindling resources forced Unisa to act in 1998, it was mainly aimed at reducing regional discussion classes as these were seen as being expensive. Thus the most effective form of tutorial support available at Unisa was cut.

The role of the instructional designer

Van Aswegen et al. (1995, p. 10) interpreted the responsibilities of the instructional designer in the course team at the OUN as being responsible for the following aspects:

- Designing and developing (with course team chair) the proper didactic approach to the course (also the media mix);
- Developing functional specifications for the materials which will be produced;
- Instructing the course authors as to what was expected of them and how they could best meet those expectations;
- Managing the development of media other than print;
- Critical reading of materials produced;
- Carrying out developmental testing prior to final draft (students take course for field testing);
- Staff development.

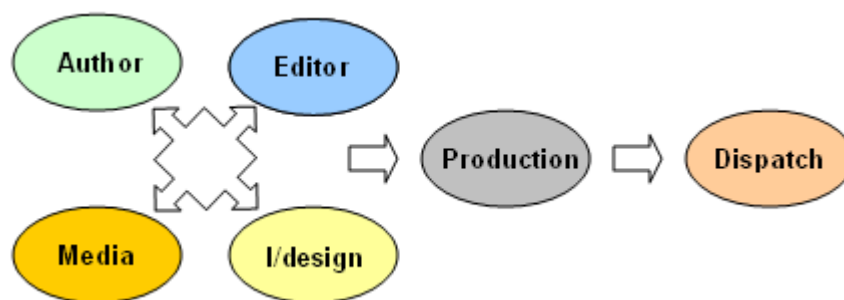
A very prominent and responsible role was assigned to the instructional designer in the Unisa course development team as in the development process at the OUN. But these responsibilities were not enshrined in policy or mandated by the institution until the publication of the official Tuition Policy in 2000. This policy mandated the team approach, the important role to be played by the instructional designer, and the project management responsibility of the Bureau for University Teaching. But it was shelved soon after publication and received attention again only in 2002. This left the instructional designer with a closed agenda, little institutional support and less visible achievement during these two years.

The instructional designer remained an agent of the system, assisting clients (academics) to package content according to the requirements of the production system. It was not a very responsible role that assured innovation towards quality learning or the challenging of the system in order to accommodate new learning and teaching requirements. The current assessment of the situation therefore is that there was no substantial improvement upon the pre-1995 team approach and instructional design. Although there was considerable change in terms of how texts were packaged in terms of graphics for a user-friendly

presentation, appearance and format, and texts written in a language that was accessible to students, communication with and support to students remained constant and in some cases was even reduced. There was limited improvement as a result of collaborative development, but the system remained unchallenged. Without the full collaborative development of learning experiences, and taking up the responsibility of critically challenging system and practice during the development process in order to innovate and change, the instructional designer was restricted to limited influence on the improvement of the learning experience.

The 1994 efforts to improve learning design was an important step for the organisation to address the quality of its teaching, as the team approach was instituted in order to enhance the quality of the study package. Unisa's course teams gained some flexibility to create innovative learning materials which were handed over to a relatively inflexible delivery system (Farnes 1993, p. 15). The following figure demonstrates such a neo-Fordist production process:

Neo-Fordist production since 1994



The instructional designer (learning developer), also the researcher of the project reported in this thesis, departed from a neo-Fordist production culture when the sample course development was initiated. The learning developer acted under the influence of a culture that saw fit to exclude a significant number of people from the development process by making the wrong assumptions. The project was placed in jeopardy as a result of these

assumptions and a dysfunctional team was established initially as a result. After the course was conceptualised, the first attempt to communicate was to set up a meeting to bring important support and administrative staff together in order to discuss their roles and responsibilities in steering the sample course through the system:

*From: J F Heydenrych
To: Support department group
Date: 2000/10/26
Time: 09:00 – 11:00
Subject: Delivering the first course
Place: TVW 4-86*

Hi Colleagues

We are trying to put all the mechanisms in place for the delivery of our first full online course. The handling of course codes, assignments and issues around the examination need to be finalized. The course is to start on 17 February 2001 and we would like everything to be in place somewhat before the time.

Your presence would be appreciated as we are trying to show that Unisa can move forward with these technologies. Many of the admin procedures and structures may demand some changes to accommodate this new mode of delivery. Sorting everything out may benefit all future courses to come.

Regards

Japie Heydenrych

Unfortunately this attempt to involve more key people was implemented too late for it to be accepted as an honest effort to work according to a culture of collaboration. Resistance started to develop soon after the meeting, as can be seen from the following e-mail received from Mr Kelvin Beckworth from the Examinations Department:

*From: K T Beckworth
To: Heydenrych, J F
Date: 2000/10/26 02:31:12
Subject: Online course*

Thank you for inviting myself and Chris to the meeting of 26/10/2000. I just acquired the distinct impression that both Chris and I had a considerable knowledge shortfall, and it made it difficult to make a valid contribution to the discussion. I also observed that the other participants had more insight into the thinking around the subject no doubt from prior consultation. I am not stating this in order to complain but I wish to bring to your attention that it is crucial that all parties involved in a process are in

fact consulted from the inception of that project. Such participation can only lead to full ownership of the project as well as gaining the benefit of the expertise required.

I would like to confirm that you will be forwarding me an outline of the details pertaining to the implementation/design of the on-line course/module and how you envisage the process will unfold. This will provide me with information which I will use to brainstorm with the relevant persons in the examination dept in order that we can provide our inputs for the implementation of the course on line. I would like to state that the dept is committed to providing excellent service to all users thereof, however, we need to be consulted from the outset so that we can provide guidance to the project team regarding aspects of assessment.

Kind regards

Kelvin Beckworth

This was a confirmation that the oversight concerning the constitution of the team was the fault of the instructional designer (team coordinator). The essence of the problem was explained in this message. A positive result of the oversight was that the rethinking of the nature and role of a learning development team and the development process was stimulated. The participants demonstrated thorough understanding and commitment to change and involvement. If they understood and were allowed ownership of the process they were prepared to contribute. The following answer was based on assumptions that were contrary to the principle of inclusivity and the aim to involve all possible participants right from the start as equal contributors:

*From: J F Heydenrych
To: Core support team
Date: 2000/10/27 07:45:33
Subject: Online course project*

Hi Kelvin

In reply to your e-mail of 26/10, we regret that you and your colleagues feel left out of the process regarding this online learning project. It was not the objective of the initiators to exclude anybody involved in the eventual delivering of the course.

For the past few months we had a few meetings with the relevant staff from Industrial Psychology, the Library, and a few times with staff from Computer Services. It is only during the last month that the project appeared to be very viable, and we decided to push ahead with implementation and delivery in the first half of 2001.

Our approach involved the thorough investigation of issues like epistemology, teaching approaches (pedagogy) and learning, instructional design of content, adaptation and conversion of content, selection of development and delivery technologies, provision of e-resources, etc. We thought it inappropriate to submit you

to this phase of the development as it wouldn't have had much effort on your systems and procedures, and besides you might have found the content of the numerous meetings very boring - your valuable time could have been spend otherwise.

We intended on bringing assignments, Examinations, and Under-graduate Student Affairs into the process when we felt secure about the development. This incorporation process was started almost a month ago when we invited you for a meeting and GroupWise let us down. The meeting went ahead with those people who did get the information. There is still four months left before the date of delivery, and we intended to, as far as possible, make use of the facilities provided by current operational systems. We did not expect any major changes to your system therefore, and for that reason we started communicating at the abovementioned moment in time.

It is accepted that your Department has to be involved in the innovative projects like these to ensure long-term planning and viable changes to systems - we expect serious steps in this regard only after the first delivery in June 2001. In my view it doesn't seem to be appropriate practice to involve service departments responsible for student systems and administration unnecessarily, and waste their, while we argue and develop philosophical, pedagogical and other facets of online course delivery. In addition it makes good sense not to let current systems dictate the quality of learning that we design and provide to our students - in the past Unisa was to some extent unable to reform our teaching and learning timeously and sufficiently in order to stay in touch with our students' needs, and world standards.

As was evident from the meeting we had, we will be able to accommodate this course successfully on your systems and we intend to provide you with all the information that you need as soon as we have it available - in this regard the willingness of staff from your department to accommodate us is highly appreciate. We are also awaiting Senex's decision on 15 November before certain steps can be taken.

The course's initiation, history and development process will be made public at a demonstration early in 2001, and all key role players will receive extensive documentation for evaluation and future planning.

We hope this made our position and strategies more understandable. Good relationships between the various service departments are of the essence and we wouldn't like to operate in a murky atmosphere.

Sincerely

Japie Heydenrych

The remark that systems should not dictate the quality of learning did in fact imply that administrative staff did not have a role to play in the quality of learning and that they were merely sustaining systems. The assumption was that they had to adapt their systems and actions without understanding why — this was contrary to objectives of the team approach and certainly contrary to the principles of the action research approach which the project would be based upon. It was the excluded people who reminded the instructional designer and team leader about these principles and how they contributed to success:

*From: K T Beckworth
To: Heydenrych, J F
Date: 2000/11/02 01:53:05
Subject: Online course*

Thank you for the reply to my e-mail of 27/10/2000.

I have noted that you have still not provided any outlines or details on the on-line course. I find this strange since you are lodging the proposal with Senex on 15/11/2000. There must be some detailed information which is available for perusal by the Administrative who are involved in the implementation process.

I would also like to comment upon some of the statements in your e-mail...

You indicated that there are still four months left before delivery and as far as possible you will make use of the facilities provided, yet in a later paragraph you state "it makes good sense not to let current systems dictate the quality of learning".

In the light of this statement I believe it is crucial to engage all relevant departments on an ongoing basis to ensure that one is arriving at the best possible solution for the project. Not just one month before implementation. You are wanting to commence registration at the end of November 2000. I would again like to request that you provide the Examination Dept with more details on the course and its envisaged implementation.

There are many questions but I hope that they will be answered when we receive the detailed outline of the course.

Kind regards

Kelvin

PS I understand that it was said at the meeting of 2/11/2000 that the Examination dept gave you a lot of uphill. I am sorry it is perceived in that light, we are the people who need to implement procedures and we are only seeking to provide the best possible service within the parameters of the capabilities of the system.

The administrative section in question was brought into the process later than necessary. They were very reluctant to cooperate and opposed the project on every possible front during the initial stages. On 26/10/2001 (research journal) they informed the team that they felt left out because they were not consulted from the start. They wanted to be involved early because they needed to understand all the underlying philosophies and decisions regarding a particular learning experience.

The researcher realized that following an approach whereby exclusion of some team members would streamline a process proved to have the opposite effect.

The project coordinator (researcher) had to re-establish a cooperative relationship with the department involved through a number of conversations and information sessions (research journal, 27/4/2001). Fortunately these were successful because towards the end of the first delivery, the head of the department involved was very enthusiastic and expressed his own visions of how all assessment and examination needs could be addressed electronically. These visions were advanced and included issues of authentication and security. But what was not most encouraging was that they were moving beyond correspondence-based industrial skills and an outlook where innovation was an exception (research journal, 23/06/2001). Other staff members of the same department called and offered their cooperation (research journal, 23/06/2001). It would seem that innovation and cultural change is dependent on an inclusive team approach (research journal, 20/8/2001).

The above conversation and later developments forced the core team to rethink the involvement of all stakeholders. It was clear that an exclusive team would not be able to obtain the objectives of the project. The objectives of enhancing awareness, the stimulation of critical reflection on teaching practice and system, would not be realized by a team consisting of 'preferred members'. The complete development process had to be reassessed.

6.2.3 Attempting post-Fordist development

Renner (1995, p. 285) was against the mechanized production of the perfect package by the course team, and the mass-marketing of standardised courseware devised by teams aiming at curriculum uniformity accompanied by a reduction in the role of teaching and support staff in delivery. In this regard he stated: 'An approach informed by post-Fordism and constructivism emphasises democratic participation in the design and implementation of flexible educational technologies. The systematic use of pre-programmed curricula is incompatible with higher levels of educational quality.' This

statement implies a different role for the instructional designer as well as for inclusive development teams.

Empowering the instructional designer

At Unisa the instructional designer traditionally found himself or herself in a core team, assisting with the design of learning experiences that complied with the production and delivery system. The whole design process was restricted by a larger production system. It was almost as if systems were restricting the design of innovative and creative learning experiences. As a result the instructional designer became merely the systems agent in the team. In this way a neo-Fordist system was maintained by the team approach. This creates a picture of many experts working together to facilitate design work dominated by a system, and the instructional designer's role being merely that of an instrument within the larger organisation.

The instructional designer was often considered responsible for policing text formats and conventions; almost similar to the graphic designer. An empowered role would demand that the instructional designer should foster and develop the balanced research role of instructional staff, and should initiate research on the learning needs of society. In such a situation, reciprocal influencing between the major groups involved in the learning experience, is fostered — the traditional instructional designer becomes a mediator acting on the ethical and socio-political responsibilities entrusted by society to a higher education institution. He or she should not be seen as a member of the instructional design police force enforcing policy and systems, but instead should be regarded as the person that initiates a critical predisposition towards teaching practice and delivery systems at a particular institution.

The learning development (instructional design) process becomes a continuous process — professional and personal development of all parties is generated, leading towards innovative design of learning experiences. The design should

not necessarily conform to prescriptions and system limitations, but may lead towards a unique and appropriate design for every course, including the facilitation and support that the learning experience deserves. Teaching and administrative staff should be able to provide rationales for their practice, and should continuously revisit these rationales as the reality of the institution changes. The researcher, as initiator of this research project and learning developer, aimed therefore not just at implementing online learning successfully, but also at changing teaching practice and organisation in the institution. The role of the instructional designer, therefore, became political as he moved from being a systems agent to becoming a change agent.

But with such empowerment come responsibilities to commit oneself to collaboration, democratic processes and critical reflection on the roles of all participants. The development process of the sample course had forced introspection on these responsibilities and acknowledgement of transgression of the basic values of such a process when they occurred:

*From: J F Heydenrych
To: Beckworth, K T
Date: 2000/11/02 03:12:07
Subject: Online course*

Hi Kelvin

There seems to be neverending thread of miscommunication. But I guess this is part of a venture of this kind.

I will send you a full outline of what this course is about as soon as we have put that together for prospective students.

The lecturer is not available right now – it would be inappropriate for me to send you something without his approval.

Regards

Japie

For collaborative learning development the process should be based on the dissemination of all information and participation should be inclusive in order to ensure ownership by all parties. The following message contains an attempt

to provide information to key stakeholders who were not involved right from the start:

*From: J F Heydenrych
To: Development group
Date: 2000/11/03 11:36:26
Subject: Online course development project*

Dear Colleagues

A tentative overview has been compiled to bring everybody up to date as to what this course is about and where we stand at the moment.

Some tasks or aspects may have been left out – for that I apologise – the important part is to explain to all contributors what the course aims at and what the learning experience will be about. It is a pilot project and we are not claiming a major impact on current Unisa systems. All of that will have to be negotiated as the project unfolds.

Your contributions so far are much appreciated by the project coordinating departments, Industrial Psychology and the Bureau for University Teaching.

The document does not claim to be inclusive, final or prescriptive in any sense. From this perspective it is only claiming at our group and not the wider University community. At an appropriate time such a demo will be organized.

Regards

Japie

The sample course project had to be taken to the Senate of the university where all the members were informed regarding the aims of the project and the research objectives. Defending the project in front of such an important decision making body was not easy. There was considerable resistance, but it was also an opportunity to gain support from other innovators in order to continue with the project and effect change. The following message contains support from a champion of change:

*From: W R Kilfoil
To: Heydenrych, J F
Date: 2000/12/01 07:23/02
Subject: Online course development*

Dear Japie

The project has intrinsic value, it is future oriented and it is well planned. Besides that, we need to explore ways other than examinations of assessing students' knowledge and skills because that is what OBE demands. Your project is an

innovative way of doing this and I think has built-in ways of authenticating that which most of our assessment tools do not have. I was moreover extremely annoyed yesterday with the pettifogging mindsets and lack of vision displayed. The suggestions that for the period of the experiment the course should not be credit bearing and that it should be examined as well as continuously assessed nearly made me explode with the lack of understanding that people show of sound educational practice as well as instructional design.

So, good luck with the project. And keep on generating exciting ideas: one person can make a difference.

Best wishes

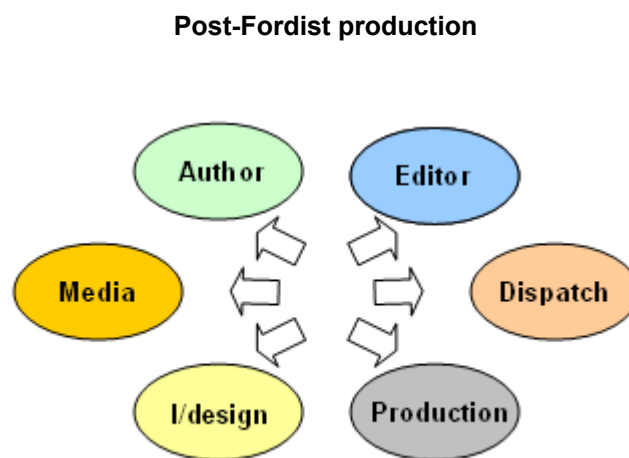
Wendy

This message contains remarks on a lack of understanding. It provides positive feedback on the project, but also paints a picture of ignorance of the principles of sound education. This situation made the implementation of the project difficult, but forced a change in the course development procedure with an embedded commitment from team members to change the production culture of the institution. In addition it made the commitments of inclusivity and dissemination of information all the more important for stakeholders to understand and become engaged in the change process.

Innovations like the sample course in the form of the OLC demanded a flexible development process which could challenge teaching and support practice towards establishing a new development and delivery culture. For Farnes (1993) such a culture should be opposed to a compartmentalization of roles in a rigid production and delivery process. A post-Fordist system allows innovation and facilitates the employment of appropriate technologies to enhance learning (Farnes, 1993, p. 16). In such a system materials design and production would not be the main cost as learner support and teaching would be the primary responsibility and the primary text supplied by the institution could be very small (Rumble in Farnes 1993, p. 17). The development and delivery of the OLC-based sample course, as a social constructivist learning experience, with integrated support and teaching by the facilitator, was an example of a product emanating from a new 'production' culture.

A major difference between this OLC-based course and normal print delivery was that the teaching/facilitation responsibilities and commitments were designed into the learning experience. Students had the assurance that a facilitator, or teacher, was with them all the time in the forums to mediate and facilitate the learning experience. With print delivery and economies of scale there is usually little communication, and students have little time or opportunity to enter into a conversation with teachers or fellow learners. In order to successfully accommodate the unique needs of an innovative learning experience during the production process, the development team had to adapt the production process by removing divisions between different functional support and administrative compartments, and had to accommodate all parties, so that they could claim ownership of the project and the innovation process.

The following figure illustrates a post-Fordist development group:



6.3 A new learning development process

A number of different distance education authors have presented macro development processes that are more or less related to the current production process. Moore and Kearsley (1996: 103) suggest a systematic, continuous and cyclical process of analysis, design, development, implementation and evaluation. Dick and Carey (1990: 2) provide a more extensive process – the

identification of instructional goals, instructional analysis, writing performance objectives, development of criterion-references test items, development of instructional strategy, development and selection of instructional materials, designing of formative evaluation and designing of summative evaluation. This process does not provide adequate direction regarding the complete production process. Bates (1995: 49) suggests a macro process of outlining the course, selecting the media, developing and producing of materials and course delivery. Although these authors provide extensive information on the importance of the inclusion of different specialists in development teams, their suggested processes are not necessarily aimed at adaptation and change of current dominant production systems and cultures that may prohibit successful innovation. The process used at the OUN as reported by Booyse et al. (1995) served as a more acceptable model for what was demanded by the Unisa online learning development process:

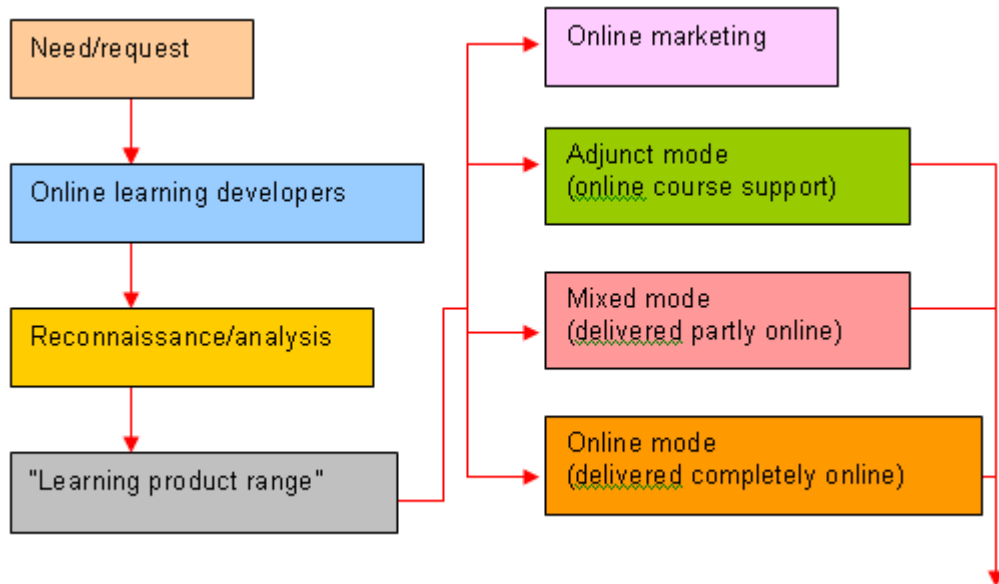
- Preliminary research and the planning phase (content and didactic design of the course, costing, course plan, approval);
- Elaboration phase (plan given concrete form);
- Production phase (physical production of course components);
- Implementation phase (last measures to get course running, and briefing and training of tutors);
- Exploitation phase (teaching-learning phase and collection of data in order to revise or discontinue course).

Taking the benefits of collaborative development teams, the unique context of Unisa and past online course development and implementation into account, the following four phased development process, based on the OUN model was adopted by the team of the sample course:

- Reconnaissance (exploring the need and possible solutions);
- Planning (collaborative construction of a development plan);

- Development and implementation (course development, evaluation and implementation);
- Enrichment (informing staff and policy generating bodies).

6.3.1 Phase 1: Reconnaissance



This phase is characterized by collaborative analysis conducted by the online learning developers and the lecturer in order to identify the product that would address the needs of the learning experience. During the initiation of this project it was evident that staff members at Unisa had different understandings of what an online course entailed. Online course support, enhancement, service provision and delivery were not provided in a coordinated structure, and it was difficult for support staff to plan their activities properly. Efficient and equitable service to learners and staff was therefore not always possible.

Identifying different options

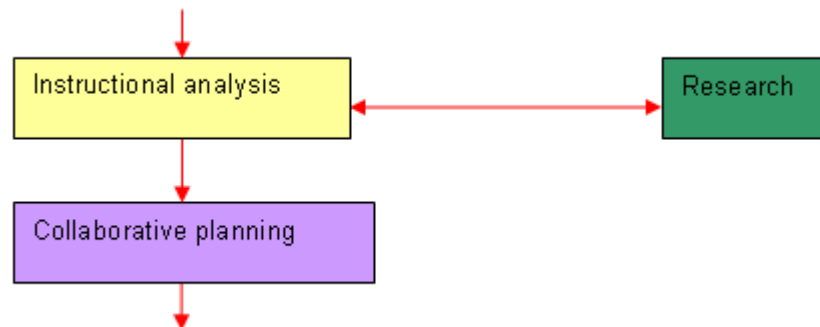
An analysis of efforts on Students Online (year 2000 statistics) and the external Unisa Website led to the identification of three categories of online learning

provision (see *A report to the Unisa Tuition Committee* attached as Appendix A for more information):

- Adjunct mode (support and service for print-based packages);
- Mixed mode (enhancing specific courses with Internet experience);
- Online mode (full online delivery constituting a second delivery mode with print).

The sample course was an example of the third option. Strategically, these categories needed to relate strongly to the cost-efficient provision of value-added service to mainly print-based learners while experimenting with full online delivery for a different audience. The provision was accepted that at undergraduate level all fully online delivered courses should also have a print-based equivalent in order not to exclude Unisa's primary clients who do not have sufficient Internet access.

6.3.2 Phase 2: Planning



Instructional analysis was an in-depth exploration of what the learning experience demands and was carried out by core development and teaching staff (issues like the learning theory, teaching perspective and curriculum, content, objectives, assessment, facilitation, etc, received attention).

Collaborative planning included contributions from representatives of all administrative, support, teaching, development and production departments in order to establish understanding and to anticipate the support needs of the

proposed learning experience. Participants included representatives from Corporate Communication and Marketing, ICT, Computer Services, Exams and Assignments, Unisa Press as graphic design and print production specialists, Editorial, the Library and Student System Administrators.

This phase proved crucial to get the sample course through the system and to assist support and administration departments with their planning. The following message contains concerns by a stakeholder section which had to be addressed collaboratively:

*From: W R George
To: Beckworth, K T; Heydenrych, J F; Systems
Date: 2000/11/06 12:53:05
Subject: Online module in Industrial Psychology*

Good day all

At our meeting last week I expressed my concern that Senate had not yet approved a module which was to be offered in 2001. Approval of modules at this late stage creates difficulties in managing the student system as it again becomes an exception to the rule. The Calendars are updated as at the May 2000 meeting and any approvals AFTER this date are accepted as being for 2002 academic year.

As indicated during our discussions, there could be further difficulties with the examinations but these would need to be taken up with that Department directly...

Sharing information and planning collaboratively was crucial to having a common understanding of the needs of the sample course project in order for it to be successful. Once proper information was provided on the technology and the pedagogy of the sample course, it was understood in a different light:

*From: W R George
To: Laubscher, M; Shahia, M; Viviers, A M
Date: 2000/11/29 10:58:04
Subject: Item for Senate – non-venue linked exams*

Good day all

As this involves also the Examinations Department I have included Mr Kelvin Beckworth on the distribution list.

From the discussions in which I have been involved, this is NOT just a venue-linked examination. If this were the case it would not need a new code. In view of the fact that the Department intends changing its form of tuition and introducing continuous

assessment for only a selected group of students, this will need the approval of Senate or at least Senex before I can proceed.

This request must please be referred to these structures for approval. There is no 'in principal' decision by the University for what is being proposed.

Kind regards

Bill George

Once approval of the sample course and pilot project has been granted, the section in question was able to make recommendations in order to successfully accommodate a project which initially was seen as an exception to the rule:

*From: W R George
To: Development group and IOP
Date: 2001/01/17 12:03:08
Subject: IOP307 equivalent for network module*

Good day all

Senate has approved the offering of this module via the network. The code for the network module is IOP377-J.

Please note that as this is an equivalent module to IOP307, the same prerequisites will apply. The Department will have to submit changes to the prerequisites to the first Faculty meeting for approval by Senate in May 2001.

Exams dept will have to be advised if the exam paper to be done over the Internet is the same as the hard copy exam. They will also have to be informed regarding the accumulation of final marks from submitted assignments.

As I am not sure as to who all should be informed of this, could I request that you distribute this notification further.

Kind regards

Bill George

Planning through constructive discussions and negotiations was important to improve service and to support innovation for the sample course environment. Staff developed a critical view on institutional practice and systems in the process.

Becoming critical about the current system

The development process established a critical predisposition with teaching and support staff alike. This led to criticism of current practice and systems, and it informed adaptation and change with the different stakeholders. The final meeting of the development group (research journal, 29/11/2001) saw participants being very critical about the general quality of the learning experience delivered by the institution. They were of the opinion that the economies of scale had forced a reduction in the quality of teaching and support.

The semesterisation process adopted at Unisa was criticized as it led to reduced levels of teaching and support. Few subject fields still required assignments and thus the level of contact with and feedback to students was reduced because lecturers were no longer committed to mark assignments and give feedback. There were discussions at faculties about returning to the delivery of modules over twelve months in order to improve teaching and support.

The criticism of the semesterisation process was supported by the feedback from the core support group. They mentioned that students had complained to them about the quality of the learning materials. They provided evidence that some study materials had remained the same since 1997 and in some instances the same memoranda for examination for four years. In fact they wanted to go so far as to state that some courses couldn't be considered as courses because no teaching took place and quality learning did not occur. There also seemed to be a misunderstanding amongst academics about research and teaching responsibilities. It seemed that the one was used as an excuse for not fulfilling the other.

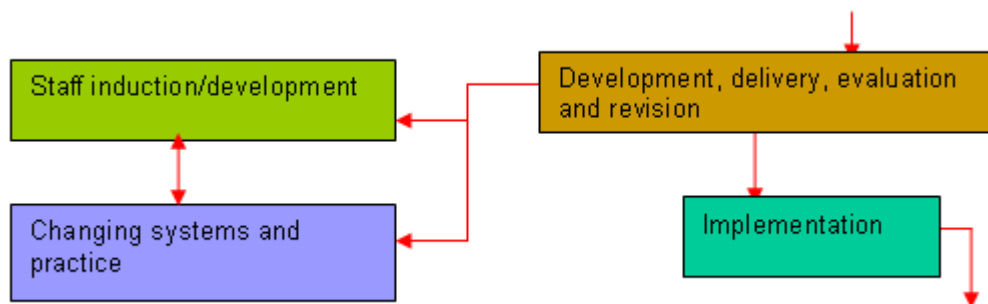
The development group also provided information on all the many under-utilised teacher training colleges all over the country with good infrastructure that could become centers for access to online learning — many more students

could have access to this type of course if computer laboratories were set up at low cost at these locations.

There was concern about the culture that existed where academics did not make themselves available to help students with enquiries and problems. Support departments were actively trying to implement multi-skilling in their departments. The ideal was that everybody should be able to do everything so that processes could be more effective. However, the development group was concerned that not enough trust was placed in staff to become more competent and efficient (research journal, 29/10/2001).

6.2.3 Phase 3: Development and implementation

The third phase embodied the development of the learning experience and the accompanying changes in the delivery system. Development, delivery, evaluation and revision included core staff as identified by the inclusive group. Stakeholders had to cope with new roles and in some cases had to develop concrete solutions.



Planning for support

The development team aimed to remain within the technology facilities that were available. Support staff from Computer Services were always prepared to assist with the technical requirements for the course and. A strong working relationship led staff of this department to see the technical support and system needs for online course delivery as a priority service. This was gratifying as

online learning and its needs had not enjoyed such a status before. However they insisted that the learning developer (team coordinator) should drive the process to make management aware of the serious needs relating to online learning (research journal, 31/10/2001). In general they would not be able to provide proper service and support towards new developments if they were not supplied with implementation plans for online learning. They felt, that as a service department, they needed to know what technical support and systems would be needed in the future so that they could plan and be ready. The collaborative aspect of the development of courses was extremely important in creating understanding and establishing the needs of support departments. They would be able to plan and implement their support in time for successful delivery (research journal, 31/10/2001).

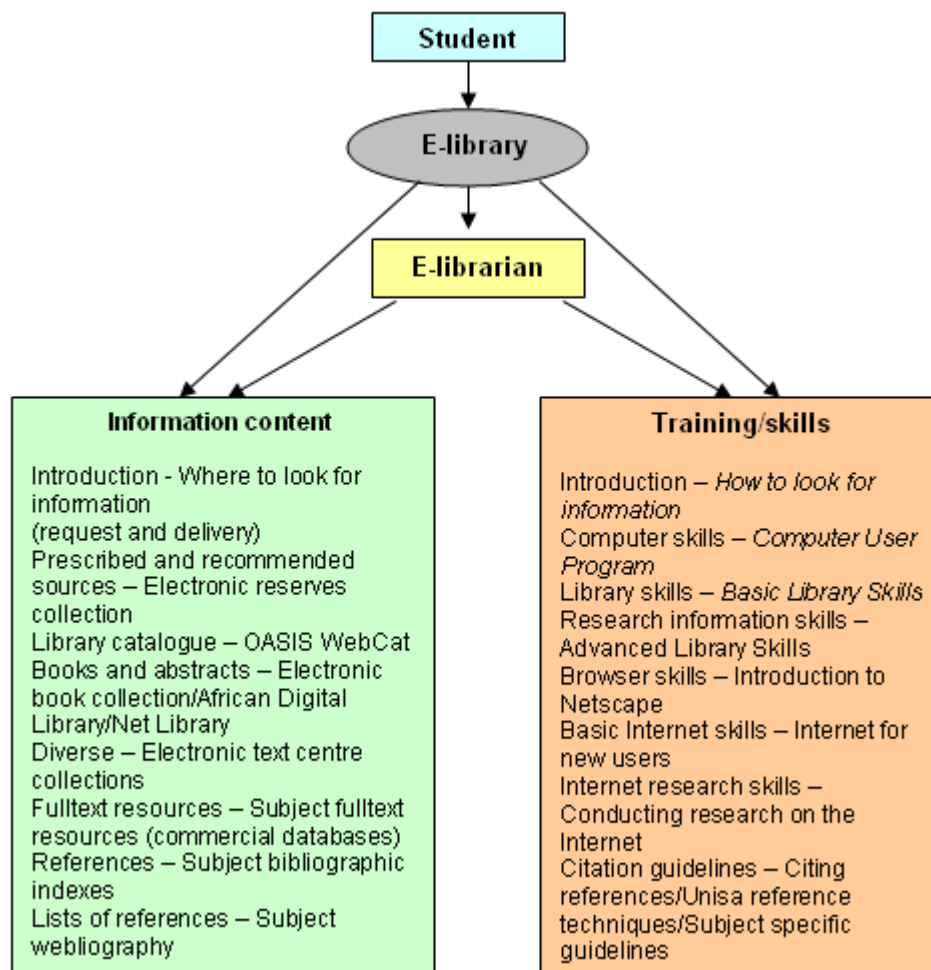
Developing new roles

The e-counsellor, as a unique role created for the sample course, had to create a new role in order to integrate her correspondence responsibilities and experience with the requirements of the online environment (research journal, 19/10/2001). Personal counseling refers to the process of assisting students with problems of a personal nature that may impact negatively on their progress. In the OLC, the group is the vehicle through which learning occurs online. But there was a change needed regarding student support in the Unisa context. Student support could no longer be considered as a service which completed a print package as the major offering. The sample course experience demonstrated that such boundaries could no longer hold true for OLC-based courses. Counselling support had to be integrated as part of the initial course design where much of the content of the course could not be specified in advance, because it was determined by the process and substance of online interaction. Learner support was no longer an add-on to a prepackaged experience because it defined what the course became. Therefore facilitators had to question the old model of a self-contained package as a first priority and learner support as a secondary priority. The e-counselling service was

subsequently expanded and was included as a standard feature of all online learning provision (research journal, 19/10/2001).

Building new structures

The very first department that was drawn into the project when it was initiated, was the Library. They were very involved from the start and after several meetings group members suggested a structure that grouped training and skills opportunities for information retrieval, together with access to all available resources in one environment. This environment included personal access for students to the subject librarian. They could e-mail directly with questions and requests. The subject librarian committed himself to follow course proceedings. This structure was very well received by students. The e-library also integrated recommended reading available on the electronic reserves. The need to use paper in this online course environment was eliminated (research journal, 29/10/2001). This online facility was developed as the e-library to accompany all online courses in future. The following figure displays the two branches of online services grouped together to form the e-library:



From instructional designer to learning developer

The role of the instructional designer (now called *learning developer*) in the Unisa environment saw serious change during the development of this project. The role accompanied important changes in the development process. The developer had to develop roles collaboratively and make people in the delivery process aware of the responsibilities as the course project unfolded. For this reason the role of course coordinator was created in pilot courses – the idea was to diminish input and eventually to disappear as the competency of facilitating staff increased. This role was therefore also important in terms of observing from within and playing an active part in guiding practice. The developer coordinated the course, but also acted as an interface between the

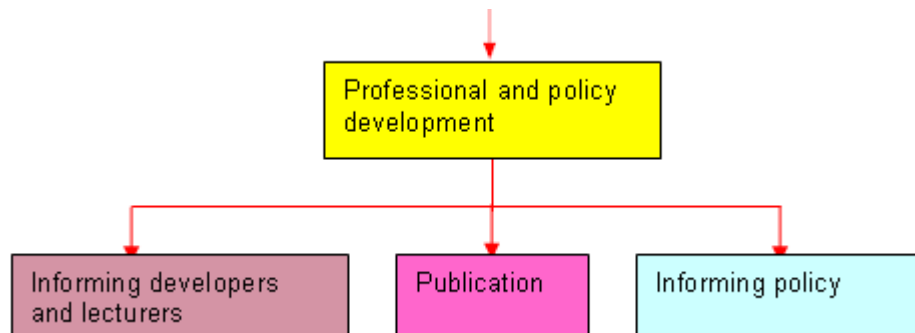
print-based system and the online learning experience. The links between these proved to be problematic at times and demanded mediation and negotiation in order to make the implementation of the sample course a success.

The learning developer came to see himself as a change agent (not a print systems agent) as changes in systems and practices were demanded as a matter of urgency by the collaboratively developed learning experience. In this sense the learning developer became the hub of change for institutional systems and practices. This innovation role implied a struggle which was overcome by persistence. The learning developer could no longer be a 'pigeonhole' in a restrictive production system.

A similar change process should be applied every time a new learning development project is implemented. The system can provide guidance, but it is changed when a collaborative project engages with it. If the system and practice is indeed affected during development, it can be considered a sign of success. To a certain extent the learning developer became an activist for the demands of an innovative learning experience in the Unisa environment. The role of the learning developer was important in keeping the teaching staff motivated and in refocussing their vision on the innovation that was to be achieved (research journal, 29/10/2001). Such commitment would make it difficult for instructional industrialism to gain ground.

6.2.3 Phase 4: Enrichment

During this phase online learning development staff, the academic community and policy bodies were informed through publications and presentations of information. A report was presented to the Unisa Tuition committee and the Senate (See attached Appendixes A and B).



A section for online learning development called ‘Cluster for Online Learning Environments (COLE)’ was established to assist staff with future projects of this nature and to drive the implementation of online learning technologies at Unisa. The staff development course ‘Sustaining the Online Learning Community’ was developed in order to cultivate an awareness of the potential of Internet communication technologies, new teaching responsibilities and the process and products developed as a result of the sample course development project.

6.4 Summary and conclusion

The introduction of the sample course forced a rethinking of the development and production culture at Unisa. Although there were attempts at innovation and improvement in the period from 1993 to 1995, the course package was still largely developed by a team that excluded important stakeholders. The package was delivered within a restrictive production and delivery system. Unisa’s production culture can be described as neo-Fordist. The execution of this project proved that Fordist correspondence institutions, which are highly industrialised, may be an extremely difficult environment into which a new delivery technology can be introduced.

Learning development cannot be held hostage by restrictive systems. Each new learning design should strive to be the ultimate learning experience and such efforts should be supported by higher management and accommodated by the

system. An appropriate development process has to accommodate collaborative critical assessment of practice and systems. This project produced a development process which stimulated change in environments and roles — the e-library and e-counsellor are examples of such changes. The instructional designer, from a very restricted mandate, became a learning developer. This position carries the responsibility of continuously stimulating critical reflection on practices and systems in order to change the institution as a whole.

Renner (1995, p. 292-295) argued for a post-Fordist system which ensures ‘academic engagement in production and student participation in deep learning.’ The recommendation for all stakeholders in institutions like Unisa is that there should be a concerted attempt launched towards increased responsibility of labour, driven by the same learner-centred visions and missions of innovative learning developers.

The next chapter will elaborate on the efforts to make this process and its underlying principles of learning development known to the academic and support staff at Unisa in an attempt to increase understanding.