LEARNER SERVICES - THEORY AND PRACTICE (1995)

Jane E. Brindley
University of Ottawa

Introduction

The field of open and distance learning (ODL) has changed a great deal in the past 20 years. Many factors have contributed to the growth and development of ODL including increased pressure for access to educational opportunities, technological innovations, and vast economic changes on a global scale. ODL is now recognized as playing an important role world wide in offering educational opportunities to people who might not otherwise be able to participate in formal studies.

The most recent literature in ODL no longer reflects a defensive stance, rationalizing what was once seen as a marginal educational activity and a learning method of last resort. Rather, there is a new confidence which comes from the recognition that ODL is not only a legitimate but a desirable from of education. Practitioners can take pride in the quality of educational experience which is being provided as well as the increased access to educational opportunities. The forms which ODL take are no longer limited to print based materials supported by correspondence or Telephone tutoring. New technologies and improved educational practices which recognize the centrality of the learner are revolutionizing the field.

As ODL comes of age, practitioners and researchers have becoming more critical in their analysis of the teaching-learning process. Published work in ODL now offers a better foundation for development of theoretical frameworks and evaluation of practices than it has in the past (cf. Evans & Nation, 1989; 1992). During the past 20 years, most research has focused on preventing student attrition by examining learner characteristics and behaviour, and by promoting better learning through improvement of course design and production, and the use of technologies to facilitate interaction. Attention has also been given to the role of the tutor or other types of academic support.

Interest is now being shown in a broader range of services for learners and the effect that these interventions might have in enhancing the quality of the learning experience. However, there has not been a great deal of research in the area of learner services which are not course content based. As ODL providers become more learner focused, it has become clear that more work is needed in this area to develop theoretical frameworks so that services can be developed and evaluated more systematically. This paper addresses the topic of learner services in ODL, examining the factors which contribute to theory building, and the more practical aspects of development of models for practice in various contexts.

For the purposes of this paper, learner services are broadly defined. As well as instructional support (tutoring/teaching), these services might include orientation and information provision,

advising and counselling, advocacy, library and administrative services, and credit co-ordination. No particular set of interventions is advocated as being most effective for all ODL contexts. Rather, what is offered is a consideration of the factors which contribute to the choice of a theoretical framework, and subsequently, to a model comprised of a particular complement of services.
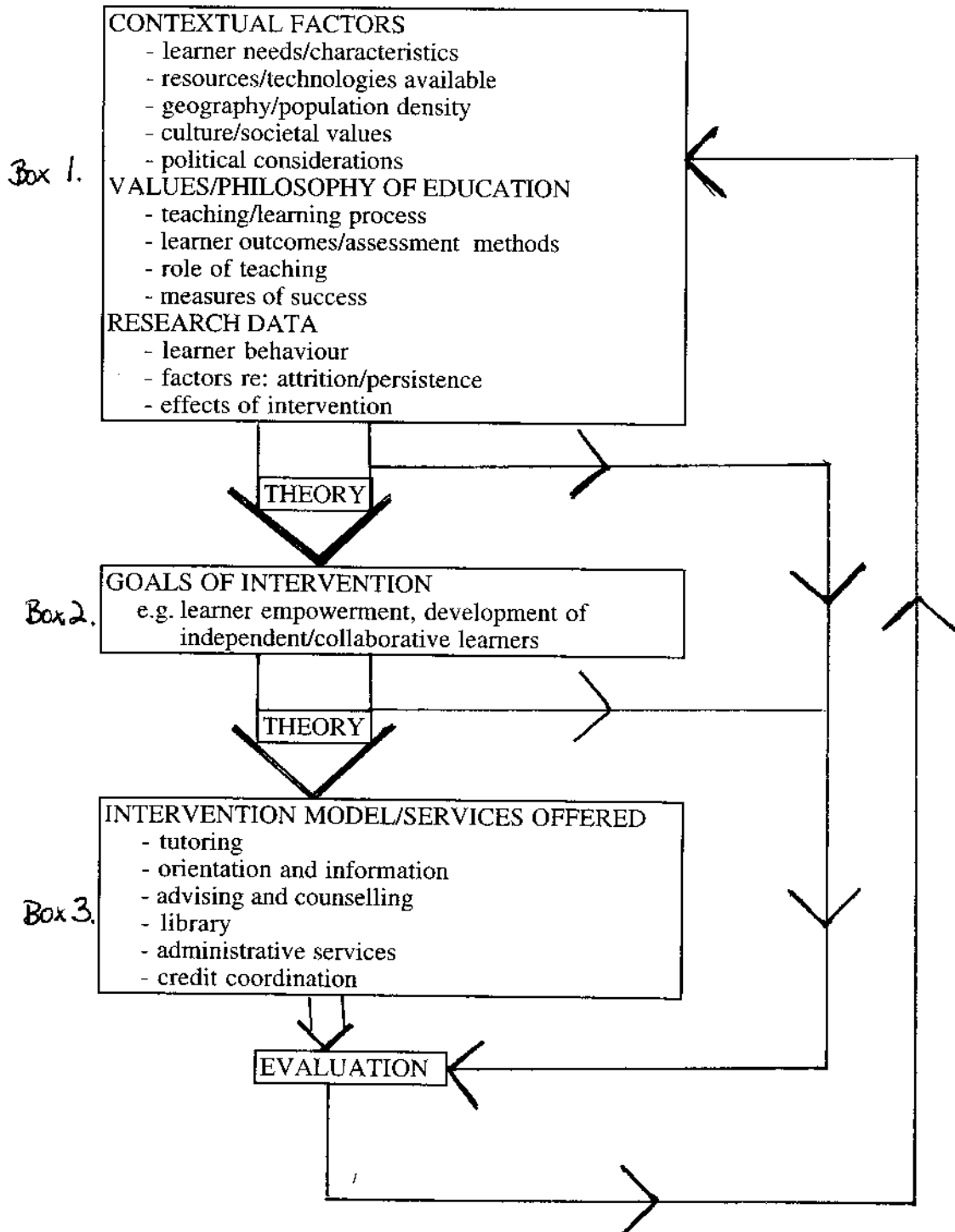
Building a Theoretical Framework

Part of the challenge in ODL is that the area of learner services is one which has not just been neglected by researchers. Within most institutions, learner services do not enjoyed a strong political or secure economic base, and in times of fiscal restraint, are usually the first areas to be reduced or eliminated (Paul, 1988). At least part of the reason for this is the way in which learner services were developed as "add ons" to a system perceived as already complete (e.g. "teacher proof packages"). Early models of correspondence or distance education which were based on economics of scale did not take into account the needs of learners for specialized kinds of service. However, in response to high attrition rates, some distance education providers began to offer course content related tutorial help. This instructional support helped to personalize and humanize an essentially industrial model of education, the main feature of which was the mass production of instructional materials which could be efficiently disseminated to large numbers of students. Following on the development of tutorial support, some institutions added other services such as advising and counselling as well as limited library access. However, resources such as counselling and libraries which are readily available to campus-based students have not necessarily been considered essential for those who study at a distance.

One of the challenges facing practitioners who develop and provide services to distance learners is to be able to provide a rationale for their activities by articulating the theoretical framework on which their interventions are based, and demonstrating its soundness through evaluation. Presumably most practitioners base their choice of services to be offered on theory, whether stated or not. What is needed is a more systematic approach wherein epistemology is made explicit, and is consistently applied and tested.

Theories are usually developed through a complex process based on research findings and knowledge gained through practice, but are heavily influenced by values, particularly educational philosophy, and other contextual factors such as learner characteristics and prevailing culture. Figure 1 is an illustration of the relationship between theory and practice within a given setting. In Box 1 are the factors just mentioned: contextual considerations such as the nature of the learners, resources available, and prevailing culture; values and philosophy of education (which are also contextual); and research data regarding student behaviour such as persistence and attrition. From these factors emerge certain theories about what enhances the learning process. How the learning process is defined and what is valued in and expected from learners will be determined to a great extent by the second factor, philosophy of education. In Box 2 are the goals of the interventions which are based on existing implicit or explicit theories. For example, a frequently stated goal in ODL is the development of independent learners. And from these goals, emerges a particular complement of services or interventions (Box 3), again based on certain implicit or explicit theories about what interventions might help learners to meet the stated goals. For example, library services can be offered such that they help students to become more independent by helping them to improve their research skills.

Figure 1.

CONTEXTUAL FACTORS
- learner needs/characteristics
- resources/technologies available
- geography/population density
- culture/societal values
- political considerations

Box 1.

VALUES/PHILOSOPHY OF EDUCATION
- teaching/learning process
- learner outcomes/assessment methods
- role of teaching
- measures of success

RESEARCH DATA
- learner behaviour
- factors re: attrition/persistence
- effects of intervention

THEORY

GOALS OF INTERVENTION
e.g. learner empowerment, development of independent/collaborative learners

Box 2.

THEORY

INTERVENTION MODEL/SERVICES OFFERED
- tutoring
- orientation and information
- advising and counselling
- library
- administrative services
- credit coordination

Box 3.

EVALUATION

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Theory is broadly defined here as the rationale for the objectives which have been identified as being important for learners (e.g. being able to learn effectively, being able to understand and apply knowledge), and ultimately as the basis for the interventions which are made. When theory is made explicit, evaluation of services can go beyond measures of satisfaction to tests of the strength of the underlying rationale for specific interventions. Hence, evaluation data contribute not only to improvement in services, but to strengthening and further developing the theoretical basis of practice.

A short paper such as this cannot address in any comprehensive way the complexities of theory building. The brief comments provided here are intended to provoke thoughtful discussion about the link between theory and practice, and to encourage practitioners to articulate and test the beliefs upon which their practice is based.

As a final comment, the current literature describing developmental and constructivist approaches to teaching and learning has much to contribute to developing a theoretical rationale for learner services (cf. Sweet, 1993). Interventions can be designed which recognize and facilitate the learner as more instrumental and active in the learning process. In this way, services are conceptualized as central to the learning process as opposed to being "add-ons" to an already complete system consisting of the course package and possibly a course content tutor.

Strategies and Issues in Building an Intervention Model

Building a model of intervention, choosing the services to be offered, and the technologies to be used in doing so is a complex process. As suggested by the model presented in Figure 1, practice is never based strictly on research data. Rather, the rationale which underpins practice takes into consideration a number of factors many of which are contextual. lt is important to be aware of what contributes to the development of a particular range of services and delivery methods, and to continually assess whether these reflect the objectives they are intended to meet. It is easy within the context of institutional demands and constraints to lose sight of service goals.

Learner services exist to serve the mission and objectives of the institution, and this will determine to a great extent where resources are focused (Lyons, 1990). Hence, it is important to assess learner needs within the context of the mission of the institution. For example, if providing access to educational opportunities is the most important objective of the institution, one implication may be that there are large numbers of learners who enter without adequate preparation. In this case, investment of resources will most likely be needed in the early stages of study to ensure that interventions are made when they are needed most to give learners the best opportunity for success.

Development of interventions can easily be influenced by issues other than the goals which have been set for services. These cannot necessarily be avoided but having a clear service model as well as long and short term plans for development may help turn potentially negative situations into opportunities. For example, in recent years, fiscal restraint has had a huge impact on the way in which educational institutions interact with learners. Those institutions with a clear notion of the role of learner services have found more cost effective ways of offering them as opposed cutting them altogether. In this respect, it may be helpful to articulate a conceptual model or

framework for an ideal complement of services which can be modified as interventions are tested, deleted and improved.

A conceptual model can be used to articulate the role of learner services within the institution and show how interventions facilitate the learning process throughout the "life cycle" of the learner, from first contact to leaving. The development of a framework can include Definition of each service, possible delivery modes, identification of priorities, staff roles, and level of staff training required to deliver various interventions. Figure 2 is an example of conceptual model for service which was developed by the author for Athabasca University in Canada (Brindley & Whelan, 1987).

There are a number of key issues to be faced when developing an intervention model in ODL. Seven which are common to many institutions are presented here as illustrations. Approaches taken to dealing with them will obviously be contextual. However, having a theoretical framework and clear goals for the proposed model will be very useful in this process.

1) congruency between learner services and the institutional mission and culture
2) fiscal restraint and resource allocation
3) centralization v. decentralization (control, authority, consistency in service)
4) recruitment and marketing v. learner advocacy
5) universality of service
6) reinvestment: staff development, research and evaluation
7) external pressures: access demands, use of technology, competition

The first issue is related to the mission of the institution and was alluded to already. It is critical that learner services are an integral part of the institutional culture and core business. A chronic problem in ODL is that learner services are often perceived as "add ons", at best as retention strategies and at worst, luxury items. Seen in this way, services for distance learners can easily be dismantled and or cut completely in the face of fiscal restraint or changing priorities. Learner services should be planned and implemented as an integrated system of interaction which is clearly part of the overall teaching-learning strategy (Brindley, 1995). In this way, the role learner services and their contribution to a particular insitution's missions and goals are clear, and have the support of all stakeholders.

Resource allocation is an issue which has become a critical factor in determining services to be offered. Resources include not just operating budgets, but factors such as staff time and skills, availability of technologies, and access to production facilities. With all of these in short supply, it is essential to carefully assess how they can best be used to meet stated goals. Within an institution, new academic programme growth can be pitted against maintenance of services in competition for scarce resources. By contrast, in an institution which has a clear service model, it is more likely that the costs of services will automatically be factored into development of new programmes. It should be noted that one way in which providers are maintaining and enhancing service options is by finding innovative ways to collaborate with their colleagues within and across organizations.

Figure 2

Athabasca University
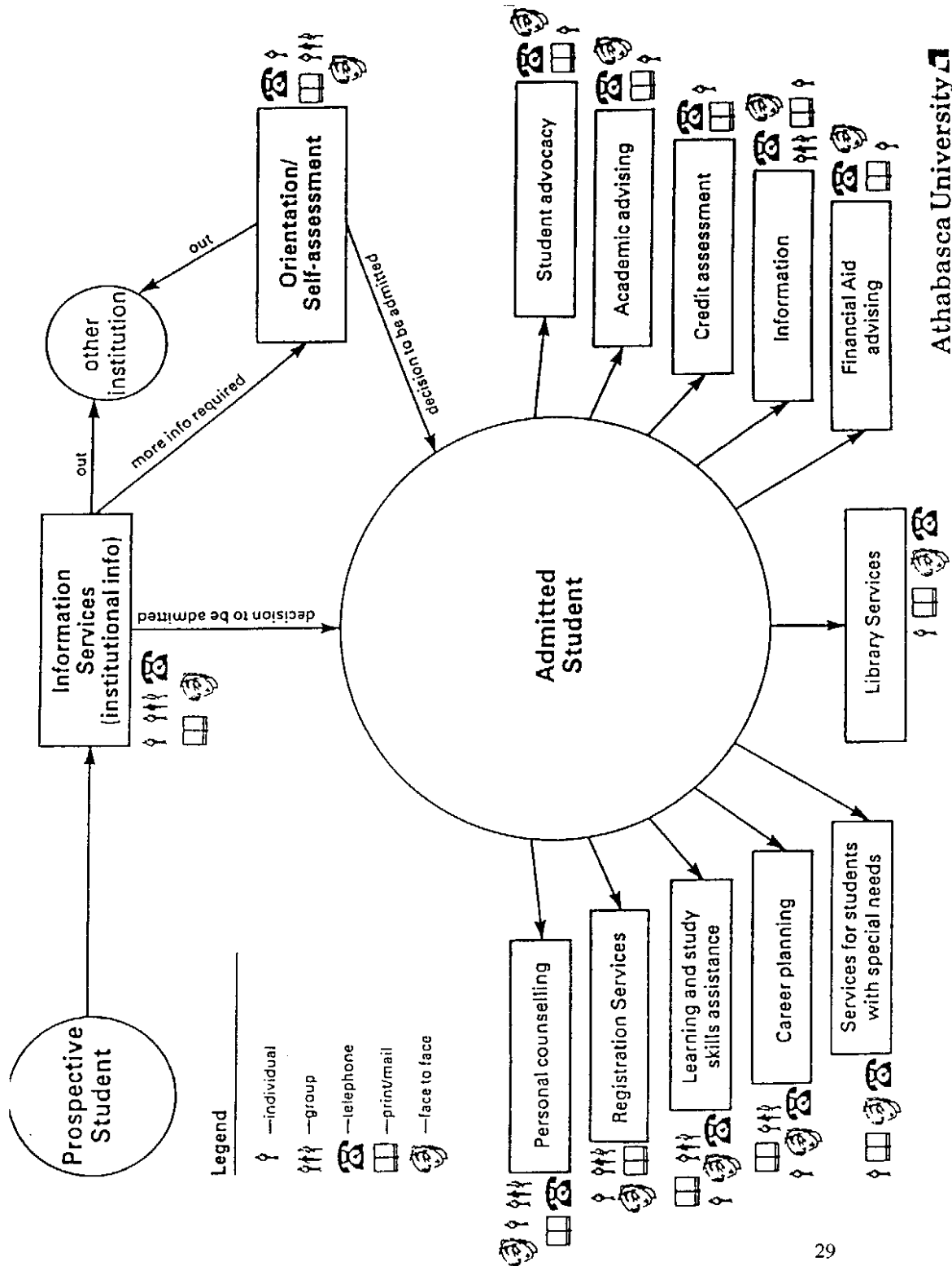
A practical issue, and often a point of tension within the institution, is how much centralization v. decentralization of services there should be. Decisions about decentralization will take into consideration such factors as geography and population density, learner needs for face to face contact, and the advantages and disadvantages to the institution of various models (see Paul, 1990). Often political considerations come into play because decentralization challenges the notion of central authority and control over standards and quality. For example, if course materials are decentralized, it can cause problems of inventory control and be costly in terms of maintaining sufficient stocks in all locations (although the latter problem is being solved by just in time publishing technology). Hence, decentralized institutions sometimes end up with the worst of models, decentralizing staff, but maintaining decision-making authority centrally. On the other hand, service oriented organizations tend to try to bring decision-making, problem-solving, and authority over these as close to the client as possible. Current technologies can help in meeting the challenge of consistency in practice and level of service (e.g. computerized registration systems), and the benefits of decentralization may outweigh the disadvantages in some contexts. For example, learners may not only be served better, but regional staff who have regular face to face contact with learners can provide valuable feedback to the institution about how well it is meeting its stated objectives.

An issue which arises in many institutions is the dynamic tension between student recruitment and student advocacy. It may be difficult for staff to have a marketing function at the same time as providing services which are designed to provide unbiased information and advising to prospective learners. The short answer to this is that it is in the best interests of the institution to enroll learners who they can best serve and make appropriate referrals to the others. (This is one of the most effective retention strategies.) Hence, the two interests do not necessarily have to be in conflict.

Another issue which arises in development of services is the question of universality. If a service cannot be provided to everyone, should it be provided to anyone? New technologies provide much more flexibility in delivery modes than was the case in the past. However, technologies are not always available or appropriate for particular services. One approach to this issue is to define baseline services which every student can expect to receive, and ensure that these are accessible by providing them in as many forms as possible including print based packages.

An issue which arises particularly in times of fiscal restraint is how much to invest in staff development, and in research and evaluation. While the answer to this question will differ according to context, the importance of these two activities to the long term health of the organization cannot be overstated. Staff development and training are essential for maintaining consistency and quality in service, keeping up with rapidly changing contexts, and creating a learning culture in which staff are continually updating their knowledge and skills. And finally, research and evaluation is at the heart of a learning culture. Practitioners must continually challenge the assumptions about what is "good" for learners, and be willing to change what they do based on their findings. Only in this way will ODL continue to be dynamic and innovative.

Shifting to a more macro level, there are a number of critical issues facing ODL providers which are shifting the focus away from learner success back to access and speed of production. ODL is increasingly seen as the answer to all that is wrong with the current educational system. While practitioners are busy finding ways to more effectively interact with learners and take a more

learner-centred approach, governments and the private sector often see ODL systems as "high tech", inexpensive, and quick methods to provide education and training. Widespread economic changes have sent underemployed and newly unemployed adults looking for educational and/or retraining opportunities. However, many of these potential learners have been educationally disadvantaged, and often, independent learning is entirely unfamiliar to them. Hence, demand for access is growing and expectations are rising at a time when government funding is being drastically reduced.

At the same time, the environment has become increasingly competitive. The number of ODL providers has grown significantly, and includes many private sector organizations, as well as traditional campus-based institutions which have now become dual mode. In this context where finding and responding to new markets and speed of production have become key issues, it is sometimes difficult to focus on promoting learner success. The challenge for ODL providers is to find ways to become more responsive to changes, particularly changes in market demands, while staying congruent with a strong value system which clearly emphasizes providing quality learning experiences. An effective and cost efficient service model which is flexible and responsive to learner needs can play a key role in meeting this challenge.

Summary

lt is an exciting and challenging time to be engaged in ODL. In the last 10 years, there has been growing concern with the inadequacy and inappropriateness of the industrial model of distance education, and a trend away from disseminating "packaged knowledge" toward new models of teaching and learning which recognize the learner as instrumental and active. For practitioners in ODL, there is an opportunity to provide leadership in making the transition to teaching/learning models which are truly learner centred. By thoughtfully designing interventions which are theory based and firmly rooted in a clearly articulated set of institutional values, ODL practitioners can contribute much to educational innovation and learner responsiveness.

A great deal of time and attention in ODL has been given to attrition research and the development of retention strategies. However, the intention of this paper is to challenge practitioners to go beyond thinking in terms of retention. The best retention strategies do not necessarily focus on merely retaining students, but rather are intentional and directed efforts toward learner development and meeting the broader goals of the teaching/learning process. Further, any interventions which are made should be consistent with the unique context in which they are offered, reflecting institutional values and objectives. Finally, while it reflects a particular bias of the author, it is probably fair to say that effective intervention with learners involves a commitment to and a caring for learners; it is in all ways learner-centred.

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