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## **Issues of evaluation**

*Mary Thorpe*

The aim of this chapter is to discuss the implications for evaluation of open and distance learning (ODL) created by public assessment of the quality of teaching in higher education. With the delivery of mainstream education programmes through open or distance means, institutions such as the Open University UK have had to match their teaching of and services for students against those of any other university provision in the same curriculum area. This emphasis on quality and demonstrable quality assurance systems is widespread and a more prevalent concern now than earlier emphases on the need for evaluation (Thorpe, 1993a). However, the teaching quality assessment process represents threats as well as opportunities for evaluation of learner support or indeed any other elements in the provision of ODL.

### **Public accountability**

In public sector provision of education, across the UK, Australia, New Zealand (Campion and Guiton, 1991) and a number of European countries, quality and standards in higher education have been subject to new forms of scrutiny and regulation. Universities have not necessarily lost their control of what counts as quality but they are no longer trusted to deliver it without inspection. Evidence and not simply assertion of quality is required, and the assurance that systems are in place which can reasonably be relied on to deliver what is claimed on a regular basis.

In the UK certainly, assessment of the quality of teaching, with the results publicly available, is set to continue, whatever the changes in the organisational details of how such assessments are made. Two types of scrutiny are involved here. First, there is the measurement of the quality of the teaching against a number of factors, such as teaching aims and objectives, student profile and progress, resources and learning outcomes. This is usually referred to as 'quality assessment'. Quality assurance refers to the existence of systems which ensure that the quality being claimed is delivered in practice. Quality assurance systems are typically audited by peer review, often including peers external to the university. Both kinds of quality, quality assessment and quality assurance, are necessary.

Whether or not this is a positive context for evaluation is not easy to judge. Evaluation is likely to thrive where there is encouragement for self-criticism and a self-improving climate within teaching departments. We should also recognise that it will thrive if it has some prestige and is rewarded, rather than paid merely lip service. There are signs of all these elements in the quality assessment processes that have been applied to the distance education delivery of higher education in the UK. There are equally some dangers, and both require exploration.

Departments being assessed have been required to submit a self-evaluation in which some evidence of a self-critical stance is seen as a positive sign. A glowing self-report with no

admission of failures or action to put things right is not to be taken at face value. It might even be seen as grounds for suspicion that everything is not as right as claimed.

Quality assessment has also created a positive climate in relation to the rewards for evaluation, which are also more evident now than before an external system was in place. Peer judgements of the quality of teaching and student support are likely to be influenced by evidence of effective evaluation and improvement. Evaluation may make a positive judgement more likely, and thus it acquires an importance which it has often lacked. That has indeed been the case so far, in that where evaluation can be shown to take place, and to feed back improvements into practice, this is recognised as a positive indication of quality in teaching and student support.

So far, so good for evaluation. Where the quality assessment and quality assurance (QAQA) emphasis is less likely to support evaluation is perhaps no less easy to see. First, there is the risk that what is encouraged is compliance rather than a genuine attempt to implement best practice. Evaluation which is only initiated because of the imminent arrival of external assessors is unlikely to survive beyond the moment of public attention. The other risk is that QAQA leads to the expansion of particular sub-sets of evaluation models which dominate attention and undermine other approaches. In some cases, feedback and surveys become the specialised roles of non-teaching staff and 'evaluation' is located quite outside the responsibilities of academic staff.

This can be dangerous because it absolves teachers of the responsibility to evaluate themselves and to strive for improvement in relation to their own objectives and standards. It is also dangerous because, in separating off evaluation of quality from those who must deliver quality, it opens up the possibility that such staff can disown findings because they have not been involved in the process by which they were produced.

How can we in distance education operate so as to make appropriate quality assurance procedures work in favour of evaluation and not so as to undermine it? The first point would be to recognise the existence of evaluation as a field of academic study in its own right and as a diverse set of practices for action and intervention in education generally. There is, for example, several decades of evaluation literature on topics at the heart of the quality debate: accountability, control and the measurement of process and outcomes in education, to take just a few.

There has also been fierce debate within the evaluation field around issues such as ownership of data and whether goal-free or goal-directed models are most appropriate. Interestingly, UK quality assessment by the Higher Education Funding Council has developed as a goal-directed version, in the sense that providers can set their own aims and objectives as the framework against which they will be judged. Goals formulated by any other stakeholders have not been used directly in establishing the criteria against which quality judgements are to be made.

It would also be appropriate at this point to recognise that distance education has generated a considerable body of evaluation literature which builds on the academic field and extends it into issues relevant to the distance model (Woodley and Kirkwood, 1987; Thorpe, 1993b; Calder, 1994). One of the positive features of our field has been the acceptance of the need for evaluation, given the innovative nature of the methods pioneered in ODL and the access orientation of many programmes (Freeman, 1991; Thorpe, 1993b). Now that ODL is a recognised player on the world stage of education and training provision-in some senses the only hope of our meeting the very ambitious targets being set for lifelong learning-we should remind ourselves of the evaluation Tradition we have initiated and use it in the quality assurance processes we put in place.

In the following section, three approaches to evaluation are outlined, each of which takes a focus on learner experience and explores it in a different way. The distinctions between each type of approach are not hard and fast but do seem to separate out important differences of ownership, methodology and use of findings.

### **Evaluation as ideology critique and conceptual review**

Distance education has been a fertile ground for conceptual review and there is a growing confidence in developing a critique of the ideology which goes with particular developments. The differences between ideology critique and conceptual review are not clear cut. An important difference, however, is that in the case of ideology critique, the social and historical context within which certain ideas attain dominance, or suffer a reversal, is to the fore in the analysis. Conceptual review gives much less, if any, attention to these contexts of power and social relationship, and focuses on the analysis of ideas and their relationship to other ideas, in theory and perhaps also in practice.

The main aim of ideology critique is thus to explore in whose interests certain practices are being promoted, and to compare and contrast the rhetoric with which particular actors and social groups accompany their actions and pursue their goals. The methods used may draw upon historical analysis through a discussion of particular events, but data collection and empirical evidence is not the primary issue. The emphasis is on the social and political currency of ideas, who uses them, and to whose benefit.

Classic instances of ideology critique in the ODL field are offered by Harris' well-known study of the establishment and early development of the Open University UK (Harris, 1987), and more recently, Edwards' analysis of the relationship between wider economic and social change and the promotion of open learning (Edwards, 1991).

Harris bases his study on a critique of the rhetoric and early decision-making of a single institution, challenging its claim to be open. Edwards is concerned to highlight the way in which open learning has been used as part of economic practices which reduce employment, intensify working conditions and depend on a labour force which can be used, as necessary, on a temporary basis. This Post-Fordist stage in capitalist development (he argues) has found the flexibility and acclaimed cheapness of open learning methods well suited to its needs. In Edwards' words, the basis for his interest in Post-Fordism is:

*that the 'progressive' discourse and practice of open learning has burgeoned at a time of resurgent right wing economic liberalism. Possible conflicting partners (i.e. 'progressive' open learning and right wing Post-Fordist practices) are walking hand in hand into the sunset. Why is this?*

(Edwards, 1991, p. 36)

The answer Edwards gives is to contest the assumption that open learning is by definition 'progressive'. Rather than see it as the innocent appropriated by Post-Fordism, he argues that it is part of a Post-Fordist construction of the meaning of late-twentieth-century economic change, and of how best to respond to such change. The Post-Fordist premise is that the highly-skilled worker should be taken as the norm, and a goal all could achieve if they take up opportunities for education and training. The likelihood that large-scale unemployment is going to be the norm for a large minority, if not the majority, is obscured by this discourse in

which individuals are assumed to be responsible for their own unemployment and also for taking advantage of opportunities for reskilling and further education.

Edwards, like Harris earlier, provides an important critique of practitioner discourse, in so far as this has offered an uncritical acceptance of ODL as necessarily more open, flexible, or progressive than traditional education and training. His arguments are, in effect, prompting practitioners to reflect on the social context in which practices are promoted and funded, and to see their own discourse as inescapably operating within structures of power and inequality.

Both Harris and Edwards have prompted a series of contributions taking issue with, or supporting, their views. This is also true of Rumble's critique of the terminology of openness and the use of open learning, although his approach is closer to that of conceptual review (Rumble, 1989). On the whole, conceptual review has been a more frequent approach than ideology critique, with many contributions to the debates over concepts such as industrialisation applied to the distribution of labour in ODL teaching (Peters, 1983; 1989), independence/autonomy (Daniel and Marquis, 1979; Gaskell and Mills, 1989; Morgan, 1985), and the importance of relationship, tuition and learner support (Thorpe, 1979; Sewart, 1987).

Both ideology critique and conceptual analysis play an important role within evaluation because they offer evidence of the meanings and interpretations in use in the field, and the value systems of the users. Such material is central to evaluative reports which take into account the intentions and motives of actors in the field, as in *Evaluation as illumination* (Parlett and Hamilton, 1972). This approach to evaluation aims to go 'beyond the numbers game' (Hamilton *et al.*, 1977) and to seek to portray the broader significance of innovation and change in teaching and learning practices, particularly as these affect relationships of power in institutions.

Evans and Nation have published two collections drawing together contributions in this Tradition (Evans and Nation, 1989; 1993). In each case, the publication has been harnessed to meetings and critical commentary between the contributors in order to promote a critical community around issues raised in the book. As practitioners in ODL, the contributors emphasise reflection on their direct experience of some aspect of ODL practice and policy, with the aim of stimulating debate and sharpening the terms within which policies and practice are evaluated.

This perspective sits somewhat uneasily alongside the QAQA emphasis on 'customer satisfaction' and fitness for purpose. However, it could be argued that one of the signs of a high quality institution is that it is open to challenge and that it fosters work which is critical of its own practices. It is important neither to avoid engagement with the political and social theory implications of educational practice nor to allow evaluation to be subordinated to the demands of management for smooth-running institutions. The chapter in Evans and Nation (1993) by Woodley, Taylor and Butcher, for example, demonstrates the politically-charged nature of what may seem a detail of research, such as the wording of the questions about ethnicity on the application form for applicants to the Copen University (Woodley *et al.*, 1993). This account of the introduction and monitoring of an explicit equal opportunities strategy embodies many of the contradictions, not only for the OU UK (Evans and Nation, 1993), but for ODL in general. This dilemma concerns whether or not to go along with all the opportunities for the market development of 'packaged learning', both nationally and internationally, or to persist with some of the original ODL goals of access and openness.

## **Evaluation as institutional research**

Evaluations in the institutional research Tradition stress empirical evidence and tend to be dominated by the presentation and analysis of findings. They provide a strong contrast to work which would fall into either the conceptual review or ideology critique category. On the whole, they are carried out by professional researchers and evaluators who may themselves be contracted or employed by institutions, Governments or funding agencies to carry out specific projects, either on particular issues or the performance of the institution as a whole.

Evaluation in this Tradition is, for example, carried out by Zentrales Institut für Fernstudienforschung (ZIFF) at the Fernuniversität Hagen, and by the Deutsches Institut für Fernstudienforschung (DIFF) at Tübingen University. This is also a major component in the evaluation carried out by the Institute of Educational Technology (IET) at the Open University UK, although staff do have 'room' to define and pursue projects of personal interest as well as the more directly-contracted evaluations.

An example which has drawn on both institutional and personal concerns in this way is the work that has been done to evaluate progress in the achievement of equal opportunities. Von Prümmer and Kirkup, for example, have studied the different rates of take-up by women at the Fernuniversität and the OU UK, and there have been various reports which document positive action initiatives pushed by particular individuals and groups, as well as those which present statistical data on the progress of the institution towards achieving equal opportunities targets which it has set for itself (Von Prümmer and Rossie, 1988; Kirkup, 1989; Kirkup and Taylor, 1994).

Since the key feature of this work is policy or institutional review, use of the findings is an important issue, and one which demonstrates most of the difficulties which have been documented in the wider field of educational research more generally (Nisbet and Broadfoot, 1980). In the context of the OU UK one of the factors affecting use has been the positioning of the evaluation with regard to internal politics and relationships, bearing directly upon those most able to apply the results of an evaluation. During the 1970s, for example, the evaluations of the OU UK Broadcast and Audio Visual Media Research Group were more widely applied to broadcasting than were those of the Tuition and Counselling Research Group to the teaching and counselling in regions. This was in part because OU BBC Productions staff were a more cohesive group, resident in the same location and more able to control their 'product', than was the case with regional academic staff. Academic staff resident in regions are dispersed geographically and across several faculties, with only indirect influence on the quality of teaching which each tutor-counsellor or tutor carries out. There were other factors of course, but issues of power and organisation were crucial to take-up and use of evaluation findings.

This creates one of the continuing struggles for specialist evaluators, which is the timing and communication of the results of their work in such a way as to influence decision-making and events. Sometimes external pressures force institutions to turn to their evaluators for evidence which will support senior management's claims about the institution. This can create the unusual experience for an evaluator of finding an open door for discussion of the detailed evidence about this or that feature of the institution's performance. This was the case, for example, when the Department for Education reviewed the Open University in 1991, and posed challenging questions about a whole range of issues around which much folklore had gathered, but for which hard evidence was not easy to find. The input of IET researchers, with

extensive experience of survey and statistical analysis of issues such as student progress and drop-out, became essential to the response made by the University.

It is only, however, in the context of an institution where there is continuing employment for institutional evaluators that the question of framing issues for evaluation arises. Staff on short-term contracts are likely to be expected to evaluate issues decided elsewhere and often by groups with a vested interest in particular outcomes. Where employment is protected, evaluators then have the 'luxury' of facing the challenge of control of their own work.

The challenges are various: to what extent should evaluation be initiated by researchers themselves, rather than done purely reactively at the request of senior management? To what extent should long-term research be pursued as the best strategy for answering questions which are of broad-based relevance to institutional concerns, such as retention of students, course choice and study patterns? These issues of control are sharply focused for staff who, as evaluators, can review one, possibly two decades of the policy- and crisis-driven senior management interest in evaluation. Issues come to the top of management agendas for a variety of reasons and create pressure on evaluators to 'come up with some answers'. Some degree of protection from this pressure is needed, however, if the snapshot approach of one survey after another is to be avoided, or at least balanced, by evidence of trends over time, and in-depth understanding of processes and outcomes.

### **Practitioner self-evaluation**

Although there may be a degree of overlap in practice between practitioner self-evaluation and other forms of evaluation, the emphasis on one's own practice as the subject for reflection, research or evaluative review, makes practitioner self-evaluation a distinct form in its own right.

The practitioner as researcher or evaluator has antecedents in the teacher as researcher model which is still alive and well, in theory at least, within the pages of the British Educational Research Association's journal (Vulliamy and Webb, 1991). In practice, however, the position is more troubled and less certain than it was when Stenhouse and his colleagues, in the late 1970s, actively developed the ideas of teachers as researchers of their own practice (Stenhouse, 1975).

The teacher/practitioner as researcher is a model which draws upon interpretative sociology for its inspiration and which seeks to demystify the research process through validating the accounts of practitioners. The importance of the contribution has been justified both in relation to practitioners and to ODL more generally (Thorpe, 1993b). Practitioners evaluate issues which would otherwise not receive the attention of specialist evaluators, and in the process of carrying out evaluation, they themselves discover more about their practice and those it affects. It carries value both as curriculum development and as staff development.

One of the claims for practitioner evaluation, therefore, is that it avoids the key problem previously identified for institutional evaluation, in that application back to practice and use of findings is direct without the intermediary group of policy-makers and management which creates problems for the professional evaluator. The sphere within which findings and insights are used,- however, may well be restricted to the practice of the individual concerned, for whom limitations of time, support staff and expertise lead into small-scale case study as the most manageable methodology.

However, in the case of the OU UK, such case studies may cover the activities of several hundred students and several dozen tutorial and counselling staff. Both Kelly and Simpson, for example, have sustained important evaluative studies over many years and contributed to knowledge of the effects of particular regional and central practices and the development of 'new initiatives' (Simpson, 1977; 1995; Kelly and Swift, 1983; Herman and Kelly, 1994). While acting as a tutor-counsellor, Simpson collated and analysed the records of counsellors working in one of the OU's study centres, and surveyed and interviewed local students, in order to evaluate, as he put it:

*the usual trinity of perspectives, i.e. what the Open University believes is desirable, what part-time staff do, and what students actually need.*

(Simpson, 1977, p. 60)

The frequency of contacts between counsellors and their post-foundation students was monitored, and the views of both were explored. Simpson was able to throw light on two approaches to being a counsellor: the 'surgery' approach versus the 'interventionist' approach. His findings suggested that more frequent early contact was established by staff adopting an interventionist approach, and that this provided a better basis for later contact initiated by the student.

The concept of intervention was developed considerably as a result of this evaluation and its publication in a journal circulated to all tutor-counsellors and University staff at that time. The substantiation of the effects of different ways of being a counsellor enabled clarification of the role required by the University, and informed the staff monitoring and staff development carried out by regional senior counsellors.

Other studies have focused on the need to retain students and to minimise drop-out which might result from poor or uninformed practice by the Open University. During the early 1990s, Kelly and Herman surveyed all new students in the North West Region who had notified the University that they wished to withdraw by March of their first academic year. (The academic year normally begins every February, after several months of preparatory and induction opportunities during the preceding autumn.) These students can be termed 'active decliners' (some just drop out by not responding to University correspondence) and the response rate on the questionnaire was reasonable at 58 per cent (273 returns from 473 mailed).

This study, like many on this issue, identified 'personal factors' as the single most frequent reason given by students for non-continuation: job change, house removal, illness, children and family relationships and so 'on. However, it identified something else too: between 40 and 50 per cent of respondents (127 of the 473 who withdrew) stated that they did intend to study with the OU again, and a similar percentage had yet to finally make up their minds. Only 25 stated that they did not intend to study with the OU again.

These findings also accord with a study carried out quite independently in the East Anglian Region. The Region has mailed a leaflet to all new students who withdraw, every year for the last ten years. The purpose of the leaflet is to check whether action might have been taken by the University to keep the student studying effectively. An evaluation of student replies on the issue of reasons for withdrawal confirms again that personal reasons are dominant (Gaskell and Simpson, 1995). Many respondents were also prepared to consider reapplying to the OU when circumstances allowed, and the report notes that more could be done to encourage such ex-students to return. Our orientation at the level of policy-making in the University tends to

assume that 'drop-outs' are an undifferentiated mass for whom the University is of no further interest. The University has tended to show a reciprocal lack of interest which is demonstrably not necessarily in either its own or its ex-students' best interests.

The particular studies mentioned here demonstrate two features which may apply to practitioner evaluation more generally. First the selection of issues and methods for evaluation reflects the immediate decision-making context of practitioners, for the good reason that these studies are action-oriented. The motivation for the evaluation is both to understand the students' perspective and also to generate better information for action locally. However, the second point of note is that practitioner evaluation, well organised and reported, can reveal assumptions embedded in 'the system' as a whole, and which ought to be challenged. The examples discussed here, for instance, relate to the Open University's orientation to students who drop out early in their first course but who have not necessarily rejected the idea of study with the OU in the future.

### **A future for both evaluation and quality assessment**

This chapter previously identified some of the ways in which quality assessment might have contradictory effects on evaluation, both undermining yet in some ways stimulating certain kinds of evaluation. It would be misleading, therefore, to conclude by suggesting that the two can cohabit in simple harmony. However, in relation to my own institution, cautious optimism about the future of evaluation could be justified at the present time. In a number of ways, quality assessment has been a positive stimulus for new forms of recognition and enhancement of evaluation. It is early days to herald a new beginning, but there are positive signs and a determination to build on the best of the past.

First, there has been a clearer recognition from senior managers that a University-wide framework for quality is needed. Since 1994, a Pro-Vice-Chancellor has taken responsibility for quality, and a Quality Assurance Panel chaired by the Vice Chancellor oversees procedures and responsibilities. This has provided a much needed legitimisation for the work of specialist evaluators in the Institute of Educational Technology and for practitioner researchers in Regional Academic Services and Faculties. It also enables the integration of these different perspectives and of those from specialist groups such as the Quality Support Centre. This Centre was set up in the Open University in 1993 as one of the outcomes of the end of the binary line and the closing of the National Council for Academic Awards. It carries out consultancies and services for UK higher education and thus brings into the Open University a much-needed insight into what other HE institutions take for granted and what by extension, they might find unusual about distance education as practised at the Open University.

Second, the OU already has a strong Tradition of evaluation and a variety of forms of feedback. Quality assessment does have a firm base on which to build and there has been a stimulus effect rather than the introduction of entirely new sets of practices. The stimulus has been both to quantitative surveys and to practitioner evaluation, with some promising institutional development created around the expansion of these, activities in order to embed practices and integrate people.

Staff have been appointed, both in the Institute of Educational Technology and in Regional Academic Services, to expand the content and frequency of student surveys of courses and services. This expansion is building on regional initiatives to explore how data can best be



used by regions for the improvement of services and academic support provided at regional level specifically. A joint IET and Regional Academic Services group has been set up to coordinate this collaborative development of institutional and practitioner research in tandem. A good beginning has been made in bringing together specialist researchers with academics who provide student support at faculty and region level. We are exploring, for example, how increasing the frequency with which we survey courses can also be used to generate data on a region-by-region basis. This would enable regions to have regular (probably annual) access to indicators of student satisfaction and response, which can be tracked over time. It might also be possible for one region to compare itself with others, or to establish benchmarks for provision of services to students.

Funding has also been found for quality-related initiatives undertaken by practitioners and inspired by any aspect of teaching and learner support. Efforts are being made to foster ownership of quality issues and to support small projects and local interests.

The OU does have a model in which a specialist unit (the Institute of Educational Technology) carries the major responsibility for quality-oriented surveys which generate student feedback. It does recognise, however, that explicit evaluation of this type is something akin to the tip of an iceberg. It rests on much implicit monitoring and review of practice by people who would not consider themselves evaluators at all. These practices need to be supported and probably to be formalised, so that we ensure that they can continue and be protected from the potentially detrimental effects of increased workloads, which are endemic to organisations in both public and private sectors at the present time.

These are, I believe, all positive signs that the OU is using the opportunity side of external QA to good effect. If I were to identify the single biggest risk, it would probably be the increased workloads to which I have just referred. Staff who no longer have time to do their jobs to their own satisfaction cannot be helped by evaluation. Unfortunately, such work pressures are increasing in my own university and doubtless in many others. Distance education is promoted as a cost-effective mode of provision, and it would indeed be unfortunate if best practice in evaluation were squeezed out in the drive to continually cut costs.

Evaluation ought to be at the heart of the public process of accountability and judging effectiveness in distance education. In the final analysis, it is the process through which we test out whether we have reached our goals and targets on access and student-centred learning, and which stimulates the kind of critical awareness which is developmental, leading to improvements in practice. It provides an important means, both for individuals and for institutions, of taking control and shaping events in response to student and staff perceptions. It provides standards of self-criticism and analysis which are in the spirit of the most enlightened approach to quality assessment. This is surely the approach most likely to deliver quality for our students' benefit in the long term.

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