



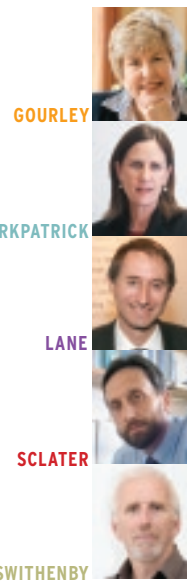
In June 2007, EDUCAUSE Vice President Richard N. Katz and University of British Columbia CIO Ted Dodds began a year-long international research project on behalf of the EDUCAUSE Center for Applied Research (ECAR). Their mission is to expand the base of ECAR quantitative research to Europe and Australasia (Australia and New Zealand), to represent EDUCAUSE in interactions with a number of international professional organizations and projects, to build additional support for EDUCAUSE work globally, and to describe exemplary leaders and their work.

By Richard N. Katz

OPEN TO CHANGE

An Interview with Leaders of the Open University

In October 2007, EDUCAUSE Vice President Richard N. Katz met with several senior leaders of the Open University: Professor Brenda Gourley, Vice-Chancellor and President of the University; Professor Denise Kirkpatrick, Pro-Vice-Chancellor for Learning and Teaching; Professor Andy Lane, Director of OpenLearn; Niall Sclater, Director of the Virtual Learning Environment Programme; and Professor Steve Swithenby, Director of the Centre for Open Learning of Mathematics, Science, Computing and Technology (COLMSCT). The Open University (OU) of the United Kingdom was the world's first successful open entry distance-teaching university. Begun in 1969 with a staff of 70-80, the university was founded on the belief that communications technology could bring high-quality degree-level learning to people who had not had the opportunity to attend campus colleges or universities. The first students enrolled in the OU in 1971, and by 1980, total enrollments had grown to 70,000, with more than 6,000 people graduating each year. In 1999, the university conferred its 200,000th graduate. Today, more than 155,000 undergraduates and more than 30,000 postgraduates are enrolled in the OU's programs. Nearly 70 percent of these students work full-time, and more than 50,000 OU students are sponsored by their employers. Another 40,000 OU students are based outside of the United Kingdom either directly with the university or through its educational partners.



GOURLEY

KIRKPATRICK

LANE

SCLATER

SWITHENBY

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"We're now looking at new models of course production—dynamic courses that are flexible and responsive."

Richard Katz: The business strategist Willie Pietersen says that every strategic breakthrough starts with a unique insight. What insight did the Open University's founders have?

Brenda Gourley: The Open University's founders had a new and compelling idea. This was the idea that a university could bring people in from *wherever*—with no particular educational backgrounds—and give them lots of support, and they would succeed.

Katz: How did the founders do this?

Gourley: They did this by focusing first on the quality of materials. The OU's materials are of an exceedingly high quality. Second, the OU's founders wanted to promote the use of whatever communications technologies were available in 1969. Little did they know! Can you imagine if they had had some peek into the future and seen the Internet? Third, they focused on quality student support. Some people who come to us from conventional colleges and universities tell us that they actually have more personal attention at the Open University than they received at their conventional institution. We have tutorials. Our tutors are open to e-mail and telephone contact, and there is a range of counseling, disability, and other services that are available. If people slip behind, we monitor their progress and send in help. So the quality of the student support contributes in no small measure to the outcomes.

Katz: How are you able to reconcile open access, scale, and quality?

Gourley: Not many providers have managed to deliver high quality and open access to a few thousand students, but we have managed to do that at scale—and that's the trick—because at scale, delivering both is entirely nontrivial. Today, we have 200,000-plus students: more than 180,000 in the United Kingdom and more than 40,000 around the world—and we're growing. Because the quality of the materials is high and fixed, the quality of the student support is probably the deciding factor. We have thirteen regional offices around

the country. Each of those looks after a specific region, and in that region are dozens of study centers where students meet. So, we have about 4,500–5,000 permanent staff and 7,000–8,000 part-time academic staff. The part-time staff are the OU tutors, and they are mostly the academic staff of other universities. Each tutor looks after 20 to 25 students. Many students don't avail themselves of the tutorial service. We do not require this. Some students are getting on fine. Some are simply too busy and have too many commitments. Others simply don't wish to use the tutorial service. Tutors and students interact via electronic marking of exams and papers, via telephone, and via e-mail.

Katz: What does "openness" mean at the OU today?

Gourley: The OU is not just "open" in the sense that all are welcome. We go to even greater lengths now to identify particular places of disadvantage (and target students there) or groups and types of disadvantage. For example, we have 11,000 disabled students, and we have marvelous resources for them. We go to extraordinary lengths for these students. This is part of openness, isn't it? To reach the unreached. We have a research unit that focuses on disabled issues and comes up with software to assist disabled students. We also have special residential events for students with special needs.

Niall Sclater: Openness today also means that we have some unusual student populations with additional special needs. For example, we have some young students who aren't even eighteen years old yet. We can't send them unsupervised onto the Internet forums as part of a course. So ensuring these students' access to online learning materials poses unique challenges. As well, we have a number of students who are in prison and who are restricted in their access to resources on the web. In somewhat different ways, we have

had to design and develop instructional resource strategies that open learning materials to specialized student populations like these, but in ways that acknowledge these unique restrictions.

Denise Kirkpatrick: Although I am relatively new here, I have come to really appreciate the vision of the OU's original founders. Their idea of openness, I think, continues to guide us. As for today, I think we are wrestling not only with the idea of open access but as well with the idea of open content. Our business is the delivery and presentation of content. The movement toward open content forces us to really think about what value it is we bring to students who enroll at the Open University. I think that we are getting to that tipping point—rethinking the underlying pedagogy with which we have conventionally delivered distance education and open learning.

Katz: The Open University stands out as a bold and successful experiment in higher education. Yet I hear from all of you an urgency to reinvent this essentially radical organization.

Sclater: It is ironic. But here we have perfected the industrial model of higher education. A lot of universities would give an arm and a leg for the network of tutors we have. It is an absolutely wonderful network of very dedicated people. So we have a great resource that we need to make sure is used properly in the future. But the industrial model really is industrial. Like automakers, we make expensive tools and dies. We call them course materials. We need to recover this investment over a long period. This model fits the print age perfectly but is not well suited to the Internet age. We're now looking at new models of course production—dynamic courses that are flexible and responsive. Rather than our previous model of significant reinvestment upfront, we are now reinvesting over a dynamic life cycle of the course. An example might be regular podcasts from an expert giving up-to-date, topical information. This would change the economics of education: the marginal cost of a student is tiny in the current model, but in the future the marginal cost

might be more because more content is produced to follow the student. Curriculum development may in the end behave like a variable cost.

Steve Swithenby: Speaking of dynamic courses, we are doing some very interesting things in Second Life. We have people who are thinking about the nature of the interaction, about the nature of student identity, about the type of community being created. And that will take them on to other activities in ways that we can't anticipate yet. For example, we are doing some very interesting work in developing distributed experimental communities. One of the problems in institutions like ours is providing access to experiments. If, for example, a student is an aspiring geologist who lives in the south of England, there are not a lot of mountains to explore in the south of England. The student would have to go to Scotland to find anything even half worthy of being called a mountain. The interesting geology is elsewhere. So, how are students like these going to take part

"Learning can arise from the interaction between the learner and the content, and it is a property of the learner."

in a rich educational experience? 3G technology now makes it possible to hook students in one location up in an immersive way with students in another environment and to involve them in joint tasks. Now we have projects where people are linked—by audio and video—between a home base and a field endeavor at the level of student to student, so they are talking with each other all of the time. And they are carrying out a common task. Now we can take that idea, carry it into Second Life, and create environments. On our island, we are running an ecological experiment. Students can take a field trip on our own landscape. But we have to frame the learning experience around the landscape and not simply be mesmerized by the opportunity to create a synthetic environment. The big question is how people engage in learning as a

result of interactions enabled by this kind of environment.

Andy Lane: I think that this is the key as we shift from delivering relatively static content embedded in books and printed materials to delivering dynamic content via the Internet. Learning can arise from the interaction between the learner and the content, and it is a property of the learner, a change in the learner's "knowing" about the world as he or she interprets it. Whether the content is static (e.g., text) or dynamic (e.g., animation), linear (e.g., audio) or nonlinear (e.g., a concept map), it becomes interactive only when a learner engages with it. It is through *interaction* that learners make sense of what they are interacting with, reconfiguring their mental map of how things fit together and the nature of the links between these things.

Sclater: The bottom line is that at the OU, we have a huge and exciting change-management situation. The key question for us is how we transfer our core

competency and all of that rigor that we have developed around the creation and dissemination of print into the digital world, where things are more dynamic. We are investing in more multimedia content, more simulations, more animations and video, and more podcasting, which we are making at the university. So we are making more dynamic content. We are also busy transforming the course-production process. We currently have very rigorous but somewhat rigid processes: faculty have to get copy for their courses six months in advance to the central department, which then checks the course copy and prints it and provides all the books. We define all of these processes by the ultimate need to create and distribute text. Now the faculty are saying, "Wait a minute, we've got these virtual learning environments, we want to change things, we want to put in more dynamic content, we don't want to sign off on this six months before the course is delivered."

Gourley: In 1969, the Open University was the only game in town. Now "widening

"We need to use technology even more than we do now to reach into even more places than we do now."

participation" is a government slogan, and every college and university has targets to demonstrate what it is going to do about widening participation, so everyone is doing something. The British government has a target of having 50 percent of people in the eighteen-to-thirty age group participate in higher education, and that target is kind of eroding the OU hinterland. Having said that, we continue to be on the forefront of a number of frontiers. Lifelong learning is one. It plays a very large role and was indeed very high in the thinking of our founders. Globalization is another. Third, we need to use technology even more than we do now to reach into even more places than we do now. The scale, the quality, and the technical competence we have been able to demonstrate are breathtaking and must continue to evolve.

Our virtual communities host hundreds of thousands of transactions a day and millions of phone calls, and we've been able to keep that going, at scale, across the globe. This is increasingly where our future lies. I want the curriculum to be developed around the world in concert with partners. And then of course as Denise suggests, the whole content story is a drama that is unfolding—for example, the Open Educational Resource movement. At the Open University, we are embracing the Open Educational Resource movement, and its resonance with our very name makes it feel like part of our destiny. We are also sponsoring learning communities of whatever particular nature they might be. There is a huge world out there in cyberspace—one that represents a marvelous opportunity for us, but a very competitive one. Very competitive. So turning an organization that was really the only game in town into a lean, mean, hungry, competitive machine is the journey that we are on now. And we are traveling along that path at a really, really fast pace. *e*