

To Still Live Our Ideals

*Keynote Address at the AAOU Pre-Conference Seminar on
Outreach Library Services for Distance Learners
20th February, 2002, New Delhi*

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International or Transnational Distance Learning and Distance Learning Library Services

Where are we right now in the development of international or transnational distance learning and distance learning library services? The word I would use to most closely characterize our present state is “thresholding”. That is, of course, to convert threshold from a noun to a verb. To threshold, then, is to step out or forward onto a threshold. In the process of thresholding, every step we take puts us onto a new threshold, as we constantly evolve and adapt and undertake to move with a sense of some meaningful direction. Although always being on a new threshold can be exciting, even exhilarating, it does not tend to engender much in the way of individual security. One is literally always “on the edge,” and at times the edge can take on the proportions of a cliff.

We are all asking questions these days, and that is nowhere truer than in the arena of our professional lives. In announcing its April, 2002 conference, the Illinois chapter of the U.S. based Association of College and Research Libraries, the IACRL, opens with a metaphor for rapid change and a series of follow-up questions as given below. One is reminded, in reading these IACRL questions that one should seek not for answers only, but should strive first to pose the strongest, most effective questions. Thanks to IACRL, we begin our study with a series of strong questions:

We feel the tides of rapid change carrying us to new, uncharted destinations.

- How can we meet challenges as we progress along our odyssey?
- How can we
 - continue to serve our users?
 - meet information needs across the board?
 - be viable contributors to the educational process?
 - and still live our ideals?
- How can we share those ideals with new generations?
- And how will we build partnerships for the 21st century?” (IACRL, 2001)

As one can readily discern, because of the breadth of these questions, there are potentially scores of valid responses to each. The fact that there is no single “best” answer for each question greatly magnifies the challenge, as well as the potential for achieving a wide range of solutions. The methods which one may employ in devising answers are likewise limitless. With no little irony, the process of developing strategies through posing and responding to questions perpetuates the thresholding effect.

The IACRL opening metaphor of “the tides of rapid change carrying us to new, uncharted destinations” is perhaps no more true for any other area of librarianship than for distance learning library services. Although otherwise true across the entire scope of the library field, to some extent the metaphor of change is true for other areas of library service because of the sudden growth of distance learning and the necessity for serving distance learning students in or away from many different library settings. The IACRL

statement is another metaphor for the “thresholding” effect. What we want to avoid, of course, is simply being tossed about randomly in choppy waters. Not only do we want a sense of direction, but we also want to continue to “live our ideals...and share those ideals with new generations” (IACRL, 2001).

In terms of library services for distance learning programs, the *ACRL Guidelines for Distance Learning Library Services (Guidelines)* can provide a Rock of Gibraltar to which we can anchor ourselves in these stormy seas of change; even though, reflective of the seas of change, the *Guidelines* themselves are in a state of frequent, near ongoing revision. However, the elements of the *Guidelines* which do not change and to which we can turn for stabilization, are the ideals embodied within them. That guidelines and standards of any kind exist is in itself an affirmation of the significance attached to the processes they are intended to govern. Many of the ideals by which we wish to live in distance learning librarianship are eloquently expressed in the philosophical precepts of the *Guidelines* and provide an excellent vehicle for sharing these ideals with new generations. The *Guidelines* will be covered in more detail in Part II.

Using the same approach as the *Guidelines*, P. Tapio Varis, in his essay, “The Goals of Global Learning,” applied principles to transnational institutions that have long been used for traditional ones. In doing so, Varis begins for us a list of elements essential for the successful establishment and sustenance of transnational education. Varis uses the term “dimensions” for these essential elements:

...The quality of higher education is a multidimensional concept, which should embrace all its functions, and activities: teaching and academic programmes, research and scholarship, staffing, students, buildings, facilities, equipment, services to the community and the academic environment. Internal self-evaluation and external review, conducted openly by independent specialists, if possible with international expertise, are vital for enhancing quality. Independent national bodies should be established and comparative standards of quality, recognized at the international level, should be defined. Due attention should be paid to specific institutional, national and regional contexts in order to take into account diversity and to avoid uniformity. Stakeholders should be an integral part of the institutional evaluation process.

Quality also requires that higher education should be characterized by its international dimension: exchange of knowledge, interactive networking, mobility of teachers and students, and international research projects, while taking into account the national cultural values and circumstances.

Marco Antonio Dias, the former Director of UNESCO, has noted that globalization is consolidated by the extraordinary invasion of higher education by new technologies, especially the Internet. The development of communication and information technologies makes it possible for distance teaching institutions to strengthen their position in the educational landscape. They also pave the way for lifelong education for all and at the same time are spreading the traditional universities, more and more of which use distance teaching methods in their activities, thereby making the distinction between the two types of institutions virtually meaningless.

There are an increasing number of university networks of this kind all over the world, and the use of computers in the learning process, access to the Internet by students

as a vehicle for self-directed learning, educational broadcasting and videoconferencing are all being stepped by.

Higher education cannot, however, be visualized any longer in purely national or regional terms. Future graduates have to be in a position to take up the complex challenges of globalization and rise to the opportunities of the international labour market. The equitable transfer of knowledge and the mobility of students, teachers and researchers, and also the mobility of learning environments using eLearning applications, are crucial to the future of peace in the world.

We realize that after so much talk of technology and eLearning we are now talking of peace, cultures and human development. It is not too late to think of the goals of global learning (Varis, 2001 a).

Peace, prosperity, understanding, successful communication and cooperation among peoples and nations are the fundamentally essential requirements for the establishment and conduct of effective transnational education. These, then, are the foundation blocks upon which can be placed the desired pedagogical elements. Together these two layers of requirements form the lower, basic tiers of a three-dimensional model for transnational education.

Successful partnerships make up another essential foundation element. Partnerships between public and private entities, such as governmental agencies and private corporations, and partnerships among institutions and among nations are but two examples.

One of the largest scaled partnerships is the recently undertaken European Higher Education Area. The thirty-one European Ministers of Education who signed the Bologna Declaration on June 18, 1999, proposed a deadline of 2010 for achieving the initial structure of the Area. The number of participating partner nations has grown a bit since the original core signed the initial agreement. Andris Barblan, Secretary General of the European University Association, in his keynote address to the 13th annual conference of the European Association for International Education, Tampere, Finland, December, 2001, comments that the exact size and membership of the Area is not as important as its content, and then proceeds to provide this vision of the Area:

Educational services will be flowing freely from one side of the continent to the other, like material goods do today; the providers of education will draw resources - people or money - from all parts of the area - like industrial firms do today when assembling cars or telephones - in order to develop and package the most enticing products, be they courses or research projects, data or publications. Providers will be institutions resembling today's universities but also networks involving publishing houses, media companies, and other specialised communicators. Students of all ages will draw on the most convenient services, relevant in terms of their intellectual interests, career development or social commitments. And there will be common measurement to compare the value of the service, a Euro of the intelligence allowing for the compatibility and cohesion of the promised knowledge society - the same way tomorrow's common currency will bind the production and trade of goods all over Europe.

For learners, teachers and administrators, the freedom of movement in a common European intellectual space should offer:

- equal conditions of access to the many providers and users of higher education,
- equal conditions of support to knowledge development, in people and institutions,
- equal conditions of assessment and recognition of services, of skills and competencies,
- equal conditions of work and employment.

In Bologna, six action lines were proposed:

- the adoption of a system of easily readable and comparable degrees
- the adoption of a system essentially based on two cycles
- the establishment of a system of European credits
- the promotion of mobility
- the promotion of European cooperation in quality assurance
- the promotion of the European dimension in higher education.

Prague...added three items to the menu of activities leading to the Berlin Summit, two years from now:

- lifelong learning,
- the social position of the learner and
- the competitiveness of higher education (Barblan, 2001).

Barblan's remarks from December 2001, were rendered even more timely by the introduction of the Euro in January, 2002. With what facility and with what a sense of excitement and potential accomplishment can we transpose these goals for the European Higher Education Area into goals for global transnational higher education and global transnational distance learning library services!

Like the *ACRL Guidelines* all of these proscriptions provide principles for application to all global learning development. The phrase "lifelong learning" strikes a very definite chord with distance learning librarians, and there is a precept of the *Guidelines*, to be examined later, which specifically notes the importance of information literacy in engendering and sustaining lifelong learning as a desired outcome of all post-secondary education.

Although P. Tapio Varis does not identify the European Higher Education Area in his keynote address, "21st Century Challenges of Higher Education," Varis in effect projects a *virtual* European Higher Education Area. Like Barblan, Varis was a keynote speaker at the 13th Annual Conference of the European Association for International Education in Tampere, Finland, in December, 2001. Varis was speaking from his home base, for he is Professor and Chair of Media Culture and Communication Education Hypermedia Laboratory, University of Tampere, Finland, and Acting President of Global University System (GUS). The GUS project was initiated at an August 1999, workshop/conference on the "Emerging Global Electronic Distance Learning" held at the University of Tampere. Professor Varis is also Chairman, GLOSAS/Finland. GLOSAS is the GLObal Systems Analysis and Simulation Association.

At the 2001 conference Varis expressed the need for a unified European virtual education which would seem to coexist with that described by Barblan. Quality issues

began in Varis's opening statement. Later Varis pointed out that with virtual as with traditional education, the guarantee of quality resides with the faculty. Beyond that, Varis identified "the experience and critical function of the traditional universities" as being "central in the efforts to create new eLearning environments."

There is now a need for common European virtual education and common European degree system. The content of a European virtual university gateway service would be a portal to net-based or net-supported courses and programmes, information search, collaboration and exchange, common denominators, ownership and endorsement label. The quality issues include transparency, benchmarking, meta-data structure, user and peer reviews, sharing of models and best practice, sharing system and tool description, and user experiences....

Virtual education in Europe has mainly taking (sic) place within national level so far and there is not much transnational collaboration yet. National consortia with centre of expertise have (sic) been formed in many countries (France, the Netherlands, Finland, etc) while some single e-universities and project-based national initiatives also exist. Public-private partnerships are also developing and there are new providers of content from corporate and media linked sources. The issues of quality assurance and accreditation as well as international strategic alliances are widely discussed.

The introduction of eLearning also requires new competencies. A competency is an area of knowledge or skill that is critical for producing key outputs. The competencies can be grouped into generic categories such as general, management, distribution method, and presentation method which help illustrate the relationship among certain competencies.

Transnational education is not necessarily international in the sense that this term has been used before in the context of international education. Courses and learning materials and environment are simply offered beyond national borders. However, a university is more than a library of courses. It is still the college and the professional faculty who can give the quality guarantee to credits and credentials, degrees and diplomas. Governments will have their responsibility in quality assurance especially in courses delivered from non-accredited institutions from abroad.

The quality assurance for virtual education can follow external and internal models. The external models include multi-lateral agreements, accreditation, licensing, kite-marks, and consortia arrangements. The internal models include codes of practice and quality, and management systems. The assessment of on-line universities is often accompanied by three principles. First, the institution must demonstrate how it will achieve its goals, particularly student learning goals, and maintain high standard of quality in doing so. Goals must be stated which are specific and assessable. Second, the assessment should provide assurance that standards of quality are successfully maintained at an appropriate level regardless of the medium of the course or the methods of instruction adopted. This is a concern that students have a reasonable assurance that the course offerings they believe they are taking, based on public descriptions, are accurate regardless of where or under what format the course is offered. Third, the responsibility for the conduct of assessment should be appropriately delegated and shared.

The philosophy of eLearning focuses on the individual learner although it recognizes that most learning is social. In the past training has organized itself much for the convenience and needs of instructors, institutions, and bureaucracies. Now eLearning is the convergence learning and networks, the Internet. New university systems are being developed to new global needs.... The experience and critical function of the traditional universities is central in the efforts to create new eLearning environments.

The European eLearning summit emphasized the importance of assuring quality and certification in eLearning. Co-operation in the production and selection of best practices is needed between the private sector and teachers, instructors, ministries and pedagogical experts. Forums for peer reviews could create a useful, informal way of evaluating eContent. Existing eLearning portals could also be enlisted to function as quality filters....

The practical solutions are being made now and many standards do not go through an official and formal standardisation procedure. When everybody starts (sic) using a given standard it becomes de facto the standard without having a prior rule on it. Cooperation between traditional institutions of higher education, the private sector and governments is continuously needed (Varis, 2001b).

One of the greatest ironies concerning the elements essential to the effective *establishment* of transnational distance learning is that these very same elements are also among the most important desired *outcomes* of transnational education. As listed earlier, peace, prosperity, understanding, successful communication, cooperation among peoples and nations, and successful partnerships are *sine qua non* for establishment and sustenance of transnational education programs, and yet at the same time, are among the elements which we hope to foster in the cultures we serve.

Does this not then provide us an immovable paradox, a *Catch 22*, to draw upon a phrase that has become a cliché of our era, that the very desired outcomes of our enterprise must already be present for us to be successful? Professor Brenda Gourley, (then) Vice-Chancellor (Designate) of the U.K. Open University, discussed in detail the current, near overwhelming ramifications of this paradox in an Open University Council Lecture delivered September 21, 2001. Using the term "covenants," Gourley, also identified partnerships as "necessary to our survival." Professor Gourley subsequently took her post as Vice-Chancellor the first week in January, 2002. However, the September 21 date on which Professor Gourley delivered this address should be recalled, when she refers below to "...this week and this month and this very year...."

Not the politics of the nation state, not the politics of the city, not even the grand unifying ideal of democracy itself have so far managed to halt the growing divide of rich and poor. Technology gives every indication of increasing this divide. In the global context we know that in India, for example, only 1% of households have Internet access while in Singapore access is close to 50%. In a country as large as the United States, access is somewhat over 45% and in Britain somewhat less than 30%.... What these figures do not tell you are the disparities they hide.... In the United Kingdom a Family Expenditure Survey released in July last year shows not only the vast differences in access but that those differences relate to income and that they are growing. Single-parent families and pensioners living alone have least access of all and they will be even more marginalised in a Western society than they

would be in an African or more Eastern society, where community and family structures are still stronger.

Scenarios, stories and conferences such as these lead us to the ineluctable conclusion that we are, this week and this month and this very year, at an important turning point. One author calls it a “hinge of history”, a time when one ill-considered decision by the powerful could swing the balance and make all the difference. If we keep our heads through this crucial time we are still in a very precarious state and it will take all of our collective and individual wills to do whatever it is that we are required to do to make a better world, a more peaceful and equitable world.

All universities have a social responsibility in this matter.... Some may imagine that this task is not ours, but rather that of the nation state. Yet we have seen globalization demonstrate just how helpless the nation state can be. It is one of the great ironies of our time that thanks to the spread of democracy, more people than ever before in human history have a chance to influence their governments while at the same time globalization is eroding government’s ability to act on their behalf.... Some people may imagine that the task is that of large economic blocs. Yet we have seen in Europe the helplessness of a large bloc to deal with tides of refugees, for example, and ethnic war. The reality is that none of us, on our own, can undertake all that is necessary to the task.... Covenants are necessary to our survival. Corporations – especially those with global reach – governments, international development agencies, institutions such as the United Nations, the fast growing organs of civil society: all these must be involved. Universities must involve themselves in this endeavour or forever abandon any pretense they may have to educating.

Reflection in this case...should include consideration of the main drivers for change in Higher Education: the pressure for equity and access, for social inclusion, on the one hand and on the other the forces of globalization which have made lifelong learning an economic necessity and put education on the map as one of the biggest businesses in the world, an intensely competitive arena where only the strong and the focused will survive. The Internet alone makes literally thousands of degrees available, some of them with brands that our consumerism culture recognizes and, indeed, to which it responds. Microsoft is a good example. The Open Source ware movement adds impetus to the competitive dimensions which our institutions have to accommodate. The recent decision of MIT to put all its material on the Web is the first indication of what this might mean.

...One of the blessings in South Africa during a time of change was great leadership.... But we have learnt in South Africa, and there are many examples all over the world, that leadership does not reside in one person. Indeed it is dangerous if it does. Leadership can and should be shared. It needs to be cultivated and nurtured and developed wherever it is found. Building a culture of leadership, encouraging enterprise and being tolerant of mistakes are all necessary to a change process, where people need to be given room to grow, accommodate to new realities.

A special kind of leadership seems to be a necessary condition as well. I have been privileged to live in a country, South Africa, where all these elements were at work and where deep and profound change and learning has taken place. The question

that needs to be answered is whether or not the South African transition was anything more than an interesting episode in history and whether or not it can be transported as a learning experience to any other place in any other time. I believe it can.

...We stand at the dawn of a new tomorrow. We can either embrace the rich mosaic of our human cultures, races, religions, gender, to name but some of what could reaffirm our faith in the triumph of the human spirit, or we could seek refuge within the familiar. The natural reaction is not always the smartest. In a global age it is even dangerous. This is not a time for competition, for winners and losers, but rather a time for collaboration and reconciliation. This is not a time for the faint-hearted but for the courageous. It is a time for strong intellectual leadership – leadership which affirms the ties that bind us as citizens of the same planet, and which affirms the ethics of a common humanity (Gourley, 2001).

Thus, Gourley adds a culture of shared leadership to our list of elements essential for the effective establishment and sustenance of transnational distance learning. To synthesize Gourley on leadership: a special kind of great leadership is required, a leadership capable of effecting deep and profound change and learning; a leadership that can be shared, cultivated, nurtured, and developed, building a culture of leadership, encouraging enterprise and being tolerant of mistakes; a leadership which affirms the ties that bind us as citizens of the same planet, and which affirms the ethics of a common humanity.

December, 2001 also saw the publication of a report on how satellite technology can be used to improve education in Africa. The report, a product of significant transnational partnerships of government and private business, was commissioned by Imfundo: Partnership in IT and Education, which is a development initiative for African education of the U.K. Department for International Development (DFID), <http://www.imfundo.org>.

The report, entitled “Improving Access to Education via Satellites in Africa: A Primer” was written by Mathy Vanbuel of ATiT, Belgium, and is published online to provide an overview of the opportunities afforded by recent developments in satellite technology in meeting educational and development needs, especially in Sub-Saharan Africa. While the contents are available publicly on the Imfundo web site, the ownership of the contents remains with Imfundo and ATiT. Only Imfundo and ATiT have the rights to publish this document or to allow its use by a third party. The report may be found at: <http://www.imfundo.org/satprimer/contents.htm> (Utsumi, 2001)

The profile of ATiT may be found at its Web pages:

ATiT is an audio-visual and information technologies company based in Belgium since January 99 specialising in the field of Education and Culture. The principles, Sally Reynolds and Mathy Vanbuel, have extensive experience in managing leading edge telematics-based projects in the educational and training sector. This includes training programmes whereby potential users of technology for pedagogical purposes have successfully made the transition to a technology supported environment.

ATiT provides audio-visual production, project management, training and consultancy services to clients all over Europe, which includes large organisations

like the European Commission, European Space Agency and the UNESCO as well as corporate and smaller agencies and university clients.

Activities also include specific specialised event organisation such as conference broadcasts and two way video links as well as consultancy and support services for conferences like agenda design, content development and speaker identification and orientation. The ATiT team are multilingual and creative and work in a flexible and goal-driven manner (ATiT, 2002).

Imfundo, a veritable prototype of trans-national distance learning partnerships, is defined and its mission is likewise described at its Web pages:

Imfundo (im~fun~doe) n. The acquisition of knowledge; the process of becoming educated.

The name Imfundo is from the Nguni languages [of] Southern Africa.

We chose the name because it reflects the aims and objectives of the project and describes our values and what we are trying to achieve (DFID, 2002).

Imfundo is a unique initiative, providing partners with a rare opportunity to help transform the education sector in Africa.... The provision of quality education for young people in Africa is one of the most important tasks for all of us in the international community. Working together with African governments and teachers, we can help to provide relevant and high quality training and knowledge for future generations. But this requires considerable investment and commitment. Imfundo is specifically designed to help make available such resources to African countries (Unwin, 2002).

Imfundo will work with other Department for International Development (DFID) programmes to direct the resources, energy, expertise and ideas of business, educational institutes, NGOs, multilateral organisations and donors into more strategic and sustainable outputs which bring about real change in education. We are asking for contributions to a "Resource Bank". The Resource Bank is a unique way for business, academic institutions, NGOs and multilateral organisations to support education in developing countries.

Organisations willing to give resources to education sector reform sign an MOU with the Imfundo initiative pledging their support, and indicating what type of resources they are able to give.

Activities which use ICT to improve education are developed by governments and donors. Organisations which have pledged support are then asked for specific resources which are needed to implement the activities.

Pledges might include staff time and consultancy time, e.g. to design computer networks, or provide training; equipment such as computers, routers, and printers; intellectual property, e.g. software licences; access to infrastructure in developing countries, such as telecommunications and satellite, buildings and distribution networks.

For Imfundo partners, the initiative offers them a chance to show their commitment to corporate social responsibility, gives their employees new and challenging staff development experiences, and includes them in a network of organisations involved at the interface between education, ICT and development.

Last year the Imfundo team held two private sector seminars at No 10 Downing Street. The aim was to test our proposal for a Resource Bank, to identify potential risks and to explore how the Resource Bank could be improved. We also looked for advice and comment on our draft prospectus which will be sent to potential private sector partners (Resource Bank, 2002).

In still another address of major import from still another December 2001 international conference, Professor Sheung-Wai Tam, President of the Open University of Hong Kong presented his lecture on the occasion of his being awarded the 2001 Prize of Excellence for Individuals from the International Council for Open and Distance Education. Professor Tam shared his insights on current issues in global distance learning, described the development and current status of his institution, and provided his vision of the future for worldwide open and distance education. Tam identifies the factors that have made open and distance education a global mainstream activity:

Due to a number of factors which have emerged in recent years, open and distance education has become a mainstream activity engaged in by all countries and virtually all institutions, educational companies and institutional consortia. Some of the reasons are:

- (i) the need for enhanced access to the provision of equitable and quality education;
- (ii) the demand for higher education at an unprecedented pace and with numbers which traditional forms of teaching could no longer cope with;
- (iii) the need for institutions to seek alternative sources of income in the face of dwindling national and institutional budgetary allocations;
- (iv) the effects of globalization on higher education world-wide; and
- (v) the substantial changes which the advent of ICT unleashed on the world's education scene (Tam 2001).

Based upon the developmental leadership his Open University has provided, Tam projects that new ideas will emerge on open and distance education from all developing countries, making them future resources for guidance and leadership. Tam begins this segment with a global perspective, then focuses on Asia, then the city, and then the Open University:

Given the phenomenal increase in the world's population, it is virtually impossible for any country, especially in the developing world, to provide educational facilities for all its citizens within specified physical locations. The latest projection of the world's population is that the current 6 billion will rise to 9 billion in the next 25 years, with developing countries constituting over 60 per cent of this figure. It has been estimated that over 900 million of the world's poor live in the Asia-Pacific region. The region has the world's highest rate of illiteracy and, by implication, the largest number of those needing access to education. There can be no doubt that they need to rely much more on education, especially in non-traditional forms, for the development of their human resources. Economic and other opportunities in the

next 50 years will depend very heavily on a new generation which thrives on knowledge. This might be the reason why in Asian countries the use of distance education as a vehicle for human and other resource development is fast becoming the 'traditional' form of education. To date, seven out of the ten mega universities identified in the world are located in Asia. Open and distance education is growing by leaps and bound (sic) in the Asian region as it has become accepted as a viable and cost-effective means of providing affordable, convenient and efficient quality education. One implication of this for the future is that significant developments and new ideas about open and distance education will begin to emerge from developing countries, and the rest of the world will shift its focus to these areas for guidance and leadership (Tam, 2001).

In the following passages, Tam uses the term "tertiary" to refer to institutions of higher learning. The term "post-secondary" is often used in the United States. Later, Tam uses the term "off-shore" to refer to those distance learning instructional programs offered in Hong Kong which originate from other nations. Still further down, Tam uses simply "ODL" to designate open and distance learning.

Hong Kong, with a population of over 6.5 million people living within a relatively small area, is one of the most densely-populated cities in the world. There are ten tertiary institutions: eight universities (one of which is self-financing and non-traditional); the Hong Kong Institute of Education which is responsible mainly for teacher training; and the publicly-funded Hong Kong Academy for Performing Arts. About 60,000 full-time and 20,000 part-time students pursue sub-degree, undergraduate and postgraduate courses in the seven traditional universities while over 26,000 pursue their education through the distance learning mode at the Open University - the only single-mode distance learning institution in the Hong Kong SAR. While the Education Department makes provision for adult education at secondary levels, almost all institutions of higher learning provide continuing education opportunities to the public. Also, the Vocational Training Council caters for about 21,000 full-time and 42,000 part-time students who need technical education.

Hong Kong has one of the largest concentrations of off-shore distance education provision in the world. As at (sic) June 2001, there were 570 non-local programmes in Hong Kong, offering more than 60,000 places. Of this total, the British programmes make up the largest share of (57%), followed by Australia with (31%), the USA (7%) and Mainland China (4%) while Canada, Macau and Ireland jointly make up the remainder.

Such a large-scale off-shore contribution to meeting the upsurge in demand for education in Hong Kong derives largely from universities in the developed world seeking to augment their progressively diminishing government funding from other sources. Marketing education overseas is an attractive option as it gives relatively huge returns for comparatively less work when compared with what they offer to their home-based students.

There are at least eight distinctive features of the model of open and distance education practiced at the OUHK which have contributed to its becoming an institution of excellence within the Asian region. These include (1) its open access policy; (2) the range of its academic programmes; (3) its course development, programme planning and quality assurance procedures; (4) its credit transfer and

advanced standing systems; (5) its provisions for student support; (6) its research activities; (7) its self-financing status; and (8) its international outreach and collaboration. While some of these were part of the original design of the University, others were introduced during the process of development.

Open and distance learning, unlike the traditional face-to-face teaching and learning environment, is characterised by distinctive course development and delivery features. First, a team must design the courses with members bringing their expertise to the instructional design process. Second, the courses must be presented in a way which facilitates study by students who are separated from their lecturers, study independently and have limited time each day to devote to self-study. Third, several means, including appropriate multi-media, must be used to deliver the courses to wherever the students are located. In the unique case of Hong Kong, 'distance' is not a geographical concept as most of the students are located within a radius of 25 km from the University. In this case, 'distance' relates more to limitations on access due to, for example, work demands and family commitments.

A comprehensive student support system is the hallmark of a quality distance education institution. The OUHK's courses and programmes are offered through study materials in various combinations of print, audio, video, CD-ROMs and online (electronic courses). The University now has over 150 courses running online, and by the year 2010, the Information Technology Plan makes provision for almost all of the OUHK courses to run online. Particularly when faced with such an array of learning materials, distance students clearly need guidance and support in their studies. The University, therefore, provides extensive support through tutorials, day schools, telephone tuition and, increasingly, online communication with tutors and fellow students - as well as self-study centres and both a physical and an electronic library (Tam, 2001).

A unique strength of Tam's institution is its emphasis on research in distance learning, an outcome of his leadership:

The OUHK gives serious consideration to the impact of research on distance and adult learning on its daily operations as a distance teaching institution, which sets it apart from similar institutions in Asia. I personally championed the need for the University to embark on research activities as a way of supporting, through empirical results and information, how it performs all its functions, including teaching and learning, the development of courses, the use of technology and student support. As a first step, in 1995, the institution set aside HK\$7.5 million for its Research & Development Fund in readiness for the setting up of a Centre for Research in Distance and Adult Learning (CRIDAL) to, for example:

- enhance the quality of scholarship and research activities;
- provide leadership through an approach to open and distance learning research that is responsive to the needs of the community; and
- foster a collaborative research culture within the University and, eventually, with our counterparts around the world.

Since its inception in May 1997, CRIDAL has made significant contributions to the development of open and distance learning research at the OUHK, within the Asian region and, indeed, within the global ODL environment. Within the University it

conducts frequent training and surgeries in research methodology, colloquia, seminars and workshops to assist staff to acquire or renew their skills and knowledge about ODL research. The Centre undertakes three kinds of projects: (i) locally, within the University, involving staff from the various units of the University for hands-on skill acquisition and development; (ii) CRIDAL staff conducting research as part of their normal employment; and (iii) consultancy and externally funded research. In its relatively short period of existence, CRIDAL has enhanced the research culture at the OUHK, embarked on capacity-building activities with staff and undertaken research projects. CRIDAL has become the East Asia regional site for the World Bank Global Distance Education Network, has established and is serving the AAOU Net, and has recently co-ordinated the ICDE Task Force on Research. Recently the Centre won three external research grants (totalling HK\$1.6 million) from the Research Grants Council of Hong Kong.

...The OUHK generates almost all of its revenue from the fees which students pay for their courses. For capital projects such as buildings, laboratories and the electronic library, government makes one-off subventions. The OUHK also benefits from the generally favourable atmosphere of endowment and charity from sources such as the Jockey Club, the Croucher Foundation and many other charitable and business and commercial organisations in Hong Kong. Self-financing status has helped the University to focus on a market-oriented strategy of providing courses for which there is high and sustained demand, applying differential fee-charging criteria, and conducting regular market surveys to determine the needs and relevance of courses directed at the Hong Kong public.

Having reflected upon ODL and what it has meant to the world, and Hong Kong in particular, it now remains...to look ahead and contemplate what the future scenarios might be. There are three major areas on which I would like to place emphasis.

The first is global demographics, ageing and lifelong education, especially in Asia. As mentioned earlier, it has been forecast that the world population will grow to about 9 billion within the next 25 years. This will have a significant impact on education and the quality of life. Many people will live much longer, but will retire early, and literacy and continual updating of one's knowledge will be of critical importance. Only a small fraction of those needing education will receive it in classrooms. Hence open and distance learning will become even more popular in the future than it is now. If the current pace of knowledge generation continues, it is likely that the half-life of the knowledge we hold will be reduced from 5 years to about 2 years. This means that there will not only be a need for continual updating and renewal of knowledge, but also that many new areas of knowledge and new careers will emerge and will need be serviced. Lifelong learning will become even more mainstream than it is today and will play its part in educating people about how to handle the key challenges which will face humanity in the near future: how to keep the spiralling population down, or at least constant, and how to manage ageing with the increased number of older adults in society.

Second, global development, especially in relation to the Internet, will see online education become pervasive. By the year 2025, the Internet will have penetrated every corner of the world as satellite communication makes it easy to reach anyone, no matter how remote. Almost every institution will invest in e-education, and the skills of designing online education will become commonplace even at the primary

school level. This implies that there will be more intense competition to market online courses around the world. Scandinavia has been in the forefront in the development of mobile phones, which has led to the emergence of wireless application protocols which will have a significant impact on the delivery of instruction to learners at a distance. With hand-held devices which will have considerable memory and processing capabilities, students will be able to access their lecture notes or other resource materials without any restrictions of time and space. It may well mean also that the desktop computer as we know it today will become obsolete. For most learning activities, it will neither be necessary for teaching to occur in a designated area nor for the printing and distribution of hard copies because everyone will carry with him or her some form of viewing device to enable the accessing of information online anywhere. The world will draw closer to the so-called 'paperless society'.

A third major future development will be the changes that will take place in Web-based instruction due to the emergence of new and more robust technologies. While it is difficult to conceptualise the new technologies which might emerge, it is possible to hazard a guess that the language of the Web will change remarkably and be much easier for all to learn and use. For the delivery of instruction, everyone will need to master the new technologies, and the choice of which technology is to be used for learning and teaching will no longer be determined mainly by the teachers but by students.

For distance education institutions or open universities, the implications of all these future scenarios are of major significance and all their ramifications must be closely analysed to make them responsive to the needs of society. Education reform will be more regular as nations struggle to keep pace with rapid developments. Globalisation and ICT will become a dominant feature of the learning landscape of individuals and communities. The emergence of learning communities will overshadow the development of specific study or resource centres. Institutions like mine will have to respond much more quickly than we do today to the needs of society, otherwise they are in danger of going out of fashion (Tam, 2001).

What a brave new world Professor Tam envisions for global distance learning. All the factors Tam covers should contribute to the growth, complexity, significance, and effectiveness of distance learning programs throughout the world. For many students, perhaps even for the majority, some form or forms of distance learning will simply be the way to learn. For those of us who are purveyors of distance learning in all its manifestations and applications, an expanding and exhilarating market is burgeoning before our eyes.

As one can see from the Hong Kong population and enrollment figures which Professor Tam supplied above, the HKOU with its 26,000 students from a city population of 6.5 million is a microcosm compared with, for instance, the Indira Gandhi National Open University IGNOU. IGNOU boasts a student enrollment of about 800,000 students scattered throughout the nation and serves them through forty-six Regional Centres and above 1000 Study Centres across all of India. As is so often the case with distance learning institutions, IGNOU has "crossed national boundaries providing higher education as well as assisting other developing countries in this regard (IGNOU, 2000).

The following passage, also from December, 2001, concerns the growth of corporate distance learning adaptations in response to the post September 11 business environment in the United States. The passage is included because of its possible implications for the future of global academic distance learning. The socio-cultural elements identified earlier in this study as necessary to the establishment and sustenance of global distance learning programs is obviously not universally available throughout the world. In fact, some individual elements are frequently missing in any given geographical setting, while the availability of each element often varies from place to place. Nevertheless, global distance learning programs are being established anyway, in spite of adverse local conditions and even, to some extent, expressly to overcome these conditions. The following passage provides some insight into the enabling adaptive processes involved:

Demand for video conferencing has rocketed.... Even when business travelers return to the skies, video conferencing is likely to remain as a mainstream corporate technology. While video conferencing technology has been around for years, until the onset of a crisis mentality most companies had considered using it for exotic rather than everyday purposes.

Similarly, distance learning and presentation systems, such as Net Meeting, Place Ware, and Ten TV, are getting more attention. While companies curtail their travel for reasons of cost, safety and inconvenience, they still must keep their employees, distributors, dealers, and customers trained. Such concerns may finally cause technology to substitute for many types of in-person meetings.

Telecommuting is also likely to become more widespread. Even companies that do not encourage employees to work from home on a routine basis will incorporate telecommuting technology as part of their disaster recovery plans (Greenhouse, 2001).

The following checklist represents a synthesis of the factors which have been identified throughout this study as essential to the establishment and sustenance of international distance learning programs:

Essential Elements for Institutions of Global or Transnational Education

Socio-Cultural Base:

- International Peace
- International Prosperity
- International Understanding
- Successful Communication among Peoples and Nations
- Successful Cooperation among Peoples and Nations
- International Strategic Alliances
- Successful Transnational Partnerships of Institutions, Governmental Agencies, and Private Businesses
- Culture of Shared Leadership

Quality Assurance Through:

- Internal Evaluation

- External Evaluation
- International Expertise in Evaluation
- Established and Equitable Standards of Quality in Evaluation
- Professional Faculty Standards and Practices
- Equitable Assessment of Student Skills and Competencies
- Demonstration of how Institutional Goals are to be achieved
- Maintaining Quality across Variations in Course Media and Methods
- Maintaining Accuracy of Course Descriptions across Variations in Course Format
- Drawing upon the Experience and Critical Function of Traditional Universities
- Establishment and Selection of Best Practices through Partnerships
- International Exchange of Knowledge
- International Interactive Networking
- International Mobility of Teachers and Students
- International Research Projects
- Comparable Degrees
- Comparable Credits
- Account for National Cultural Values and Circumstances
- Internet Access
- Internet Based Courses and Programs
- Internet Supported Courses or Programs
- Internet Based Information Searching
- Internet Based Collaboration and Exchange
- Institutional and Inter-Institutional Networks
- Interactive Compatibility of Institutional Systems
- Equitable Transfer of Knowledge
- Teaching Electronic Learning Competencies or Information Literacy
- Teaching of Lifelong Learning Skills
- Preparation for Complex Globalization Challenges
- Preparation for the International Labor Market
- International Free Flow of Educational Services
- Equality of Access
- Equal Conditions of Support to Knowledge Development

Is our list complete? No list ever is! But this one is inclusive enough that it will carry us very far, indeed, and prepare us to recognize the elements omitted and the new elements we will encounter that will have come into being well after we have first made the list. One of the most significant challenges generated by the list itself at the moment of its completion is to start brainstorming for the missing elements. Posing new questions, as in the process with which this study opened, can lead to new items for the list. One of the most valuable characteristics of the list is that it has both direct applications, as for program development and assessment, and theoretical applications, as a springboard for research.

**The ACRL *Guidelines for Distance Learning Library Services*:
Beacon Lights for Ensuring Provision of Global Distance
Learning Library Services**

The *ACRL Guidelines for Distance Learning Library Services* (*ACRL Guidelines* or *Guidelines*) are a product of the work of the Guidelines committee of the Distance Learning Section of the Association of College and Research Libraries, which is a division of the American Library Association, U.S.A. (*Guidelines*, 2000). Although comprising a forward looking and progressive document, the *Guidelines* trace their origins back to the original 1967 *Guidelines for Library Services to Extension Students* (*Guidelines*, 1967). The present document is the product of four subsequent revisions.

The current *Guidelines* are very broadly based, having been expanded in scope with each one of the four revisions, making the *Guidelines* very widely applicable to all types of distance learning programs throughout the world. Further, because of their breadth of scope, the 2000 *Guidelines* provide an excellent prototype for those wanting to devise their own locally applicable guidelines for distance learning library services.

In India, the Sectional Committee on Distance Education of the Indian Library Association (ILA) has prepared *Guidelines for Library Services for Distance Learners*. The ILA *Guidelines* are keyed to the unique circumstances and institutional structures of the nation which they are intended to serve (ILA, 2001). These ILA *Guidelines* are no doubt harbingers of those national guidelines to be produced by other nations over the coming decades, each addressing the needs unique to its circumstances.

One of the most significant qualities of the *ACRL Guidelines* is that they carry, by their very nature, a certain sort of moral force. This phenomenon of the *ACRL Guidelines* extends well beyond their nation of origin. Throughout the world, the *ACRL Guidelines* are cited again and again by those who wish to ensure that library services are provided in newly developing distance learning programs. So also are the *Guidelines* cited by those who want to ensure that library services of academic superiority are provided to existing distance learning programs.

Another way in which the *Guidelines* are frequently cited is by institutions under accreditation review, which want to assure accrediting agencies that standards of high academic quality are being maintained in their distance learning library services programs. The *ACRL Guidelines* are cited to accreditation agencies even when the agencies themselves have provided their own skeletal "guidelines" for distance learning programs specifying that library services must be included.

The *Guidelines* are further used internally within the institutions themselves by academic librarians who are involved in distance learning library services and who want to promote the use of the *Guidelines* by their upper-level institutional administrators. These administrators include academic vice presidents, and/or provosts, and especially college or university presidents, and members of boards of regents. The intent of these librarians is to engender a broader-based institutional awareness and commitment to distance learning library services among these upper-level institutional administrators, who are responsible for setting levels of support for academic units, including the library and its programs.

The 2000 *ACRL Guidelines* themselves are available at the ACRL Web pages at the following URL: <http://www.ala.org/acrl/guides/distlrng.html>. In addition to a brief, general introduction and definitions, the *Guidelines* consist of two major components. First is a set of philosophical precepts or principles. The second, following the precepts, is a series of categorized lists of recommendations for achieving or ensuring adherence to

the opening philosophical principles. The lists of recommendations are provided in the following categories: management, finances, personnel, facilities, resources, services, documentation, and library education.

The moral force of the *Guidelines* is found in the philosophical precepts and is derived from their being intended to secure and protect the rights of those for whom they were written: the rights of distance learning students, faculty, and related personnel to library services *equivalent* to those available to students in traditional campus settings. What follows is an examination of those philosophical precepts themselves.

The Guidelines assume the following precepts:

Precept one: superior academic skills

Access to adequate library services and resources is essential for the attainment of superior academic skills in post-secondary education, regardless of where students, faculty, and programs are located. Members of the distance learning community are entitled to library services and resources equivalent to those provided for students and faculty in traditional campus settings. (*Guidelines*, 2000)

Precept two: lifelong learning skills

The instilling of lifelong learning skills through general bibliographic and information literacy instruction in academic libraries is a primary outcome of higher education. Such preparation and measurement of its outcomes are of equal necessity for the distance learning community as for those on the traditional campus. (*Guidelines*, 2000)

Precept three: equivalent teaching and learning results through equivalent library services

Traditional on-campus library services themselves cannot be stretched to meet the library needs of distance learning students and faculty who face distinct and different challenges involving library access and information delivery. Special funding arrangements, proactive planning, and promotion are necessary to deliver equivalent library services and to achieve equivalent results in teaching and learning, and generally to maintain quality in distance learning programs. Because students and faculty in distance learning programs frequently do not have direct access to a full range of library services and materials, equitable distance learning library services are more personalized than might be expected on campus. (*Guidelines*, 2000)

Precept four: responsible institutional support through separate funding

The originating institution is responsible, through its chief administrative officers and governance organizations, for funding and appropriately meeting the information needs of its distance learning programs in support of their teaching, learning, and research. This support should provide ready and equivalent library service and learning resources to all its students, regardless of location. This support should be funded separately rather than drawn from the regular funding of the library. In growing and developing institutions, funding should expand as programs and enrollments grow. (*Guidelines*, 2000)

Precept five: technical linkages

The originating institution recognizes the need for service, management, and technical linkages between the library and other complementary resource bases such as computing facilities, instructional media, and telecommunication centers. (*Guidelines*, 2000)

Precept six: compliance with national, regional, and professional accreditation of programs

The originating institution is responsible for assuring that its distance learning library programs meet or exceed national and regional accreditation standards and professional association standards and guidelines. (*Guidelines*, 2000)

Precept seven: library involvement in program development

The originating institution is responsible for involving the library administration and other personnel in the detailed analysis of planning, developing, evaluating, and adding or changing of the distance learning program from the earliest stages onward. (*Guidelines*, 2000)

Precept eight: program accountability through outcomes assessment

The library has primary responsibility for identifying, developing, coordinating, providing, and assessing the value and effectiveness of resources and services, designed to meet both the standard and the unique informational and skills development needs of the distance learning community. The librarian-administrator either centrally located or at an appropriate site, should be responsible for ensuring and demonstrating that all requirements are met through needs and outcomes assessments, and other measures of library performance, as appropriate, and as an ongoing process in conjunction with the originating institution. (*Guidelines*, 2000)

Precept nine: equivalent services through innovative approaches

Effective and appropriate services for distance learning communities may differ from, but must be equivalent to, those services offered on a traditional campus. The requirements and desired outcomes of academic programs should guide the library's responses to defined needs. Innovative approaches to the design and evaluation of special procedures or systems to meet these needs is encouraged (*Guidelines*, 2000).

Precept ten: resources and services consistent with broader institutional mission

When resources and services of unaffiliated local libraries are to be used to support information needs of the distance learning community, the originating institution is responsible, through the library, for the development and periodic review of formal, documented, written agreements with those local libraries. Such resources and services are not to be used simply as substitutes for supplying adequate materials and services by the originating institution. The distance learning library program shall have goals and objectives that support the provision of resources and services consistent with the broader institutional mission (*Guidelines*, 2000).

In using the on-campus provisions of traditional colleges and universities as benchmarks, the *Guidelines* follow a principle expressed by P. Tapio Varis in Part I: "The experience and critical function of the traditional universities is central in the efforts to create new eLearning environments." (Varis, 2001 b). The *Guidelines*, of course, apply the principle far more broadly to library services for all aspects of distance learning. The *Guidelines* are very much like the checklist at the end of Part I. In fact, there may very well be some items in the Part I checklist that will be incorporated into the next revision of the *Guidelines*. The list building processes are organic. The processes never end, and the checklists are never complete. The power of the checklists, or with the *Guidelines* as a check list, is their stabilizing effect, identified as anchoring in Part I and as beacon lights in Part II. Beyond stabilization, the checklists ensure that program developments are as complete as possible and that their users are as adequately served as possible.

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