

# **CHAPTER 1 : THE UNIVERSITY OF THE SOUTH PACIFIC: HISTORICAL DEVELOPMENT AND BACKGROUND TO ITS DISTANCE EDUCATION PROGRAMME**

## **1.1 Introduction: a Brief Overview of Study Purposes**

This study has two major purposes. Firstly, it sets out to explore, through a questionnaire survey, the personal, situational and study contexts of adult vocational students studying at a distance at the University of the South Pacific (USP) and the range of variables that constitutes these environments. The outcome of this objective is a profile of features and attributes which characterise the majority of students under survey. These features and attributes are derived from principles of adult and distance learning.

Secondly, the study investigates the extent to which these variables, individually or in groups, influence and predict the academic performance of the students under survey. This is undertaken by a variety of appropriate statistical procedures. Statistical outcomes are complemented by data obtained from the interview of selected students and intended to add a qualitative dimension to the study.

## **1.2 Outline of Chapter 1**

Chapter 1 presents in brief a history of the University of the South Pacific (USP) and the development of its distance education programme, focussing primarily on features of diversity of the USP Region. It discusses the effects of this diversity on the learning environments of its distance education students. In addition, it shows how these effects, significant as they are to informing a sound educational philosophy and distance education policy, have not been given due consideration for many reasons including the USP's instrumental approach to education. Issues derived from these situations constitute the study concerns on which the study objective and questions, presented at the end of the chapter, are based.

### **1.3 The University of the South Pacific: A Regional Institution**

The University of the South Pacific is a regional educational institution with unique challenges. It began in 1968 as an initiative of the British government on behalf of eleven South Pacific island nations (joined by a twelfth in 1991), following the 1965 report of the Higher Education Mission to the South Pacific (Alexander, 1968: 1), to cater to the higher educational needs of the people of its member countries. That the report was an undertaking by the governments of the United Kingdom and New Zealand, with representation by the Australian Government, indicates the extent to which the University was the result of metropolitan influence in the USP Region at the time. Although the concept of the University was still very foreign to the people and cultures of the South Pacific, and the proposal that existing institutions catering for post-secondary education at the level required by the Region was a fairly strong alternative consideration, the creation of the University nevertheless had the suggestions of a bequeathal on the peoples of the South Pacific by the departing British government, particularly intended to be a cohesive factor among its member countries in the common pursuit of education. Now covering more than 30 million square kilometres of ocean, the Region of USP is marked more by the differences among its member countries than by their similarities. The map of USP provided as Appendix 1, shows its geographical spread as far north as the Marshall Islands, its newest member, east to the Cook Islands, South to Tonga and as far west as the Solomon Islands. Other member countries are Fiji, Kiribati, Nauru, Niue, Tokelau, Tuvalu, Vanuatu and Western Samoa. The countries range in size from single island nations to nations consisting of hundreds of inhabited islands scattered in linear or random fashion over a large area of ocean. Figure 1.1 following indicates the extent of the differences among these island nations in the areas given.

### **1.4 Regional Differences**

#### **1.4.1 Demography, language and culture**

The Region represents the three major culture groups of the South Pacific - Melanesia, Polynesia and Micronesia - with a total population of just over one and a half million, about half of which occurs in Fiji with a little under 750,000 people. The smallest country is Tokelau with 1,700

people. Well over a hundred local languages and dialects are spoken in countries of Melanesia (Fiji, Solomon Islands and Vanuatu), as well as in the Marshall Islands. Polynesian (Cook Islands, Niue, Tokelau, Tonga, Tuvalu and Western Samoa) and Micronesian (Kiribati and Nauru) countries are basically uni-cultural nations whose people speak a single native tongue (Douglas and Douglas, 1989). All countries of the Region are English-speaking with French spoken as well in Vanuatu, Hindi spoken by most of the large Indian population in Fiji, and many other languages spoken by ethnic minorities who have settled throughout the countries of the USP Region. In uni-cultural countries, there is a tendency for the local language to dominate work, social and family life, allowing limited opportunity for English to be spoken, practised and expanded. Multi-lingual settings tend to encourage the use of a common language or lingua franca, either pigin or English, the latter having more of an advantage in countries where English is the medium of instruction in schools

**Figure 1.1: Political, Geographic, Demographic and Socio-economic Features of Countries of the USP Region<sup>1</sup>**

Country	No. of Is.	Land & sea area	Population	Political description	Language(s)	Average Wage
Cook Islands	15	L=240sq kms S=2.2m sq kms	17,135	1965 self-gov.; free association with NZ	Maori & Eng.	\$NZ2.09hr.
Fiji	320	L=18,376 sq kms S=not available	715,375	1970 ind. from Gt. Br. 1987 Republic	Eng., Bauan Hindi	\$F7,577 per annum
Kiribati	33	L=810.68 sq kms S=5m sq kms	63,833	1979 ind. from Gt. Br.	Ikiribati English (off.)	\$A0.39hr
Marshalls	34	L=171 sq kms S=2m sq kms	43,335	1986 ind. from USA; free assoc. with USA	Marshallese; Eng.; dialect	\$US2414-4141 per annum
Nauru	1	L=21 sq kms S=not available	8,041	1986 self-gov. republic from trust govts. Aust., GB. and NZ.	Nauru (natnl. lang.); Eng.	High income from phosphate
Niue	1	L=258 sq kms S=not available	2,531	1974 self-gov. with free assoc. with NZ	Niuen; Eng.	\$NZ1.15- 2.67hr
Solomon Islands	6 large many sm.	L=29,785 sq kms S=not available	285,796	1978 independent	Eng.(off.); pigin; vernac.	\$SI12,298 per annum
Tokelau	3	L=12.2sq kms S=not available	1,703	NZ administration	Tokelauan; some English	N/available
Tonga	150	L=696.71sq kms S=259,000 sq kms	94,535	1970 ind. from GB, treaty of friendship	Tongan; English	\$T4-6 daily
Tuvalu	9	L=25.9sq kms S=1.3msq kms	8,361	1978 ind.; '79 treaty of friendship with USA	Tuvaluan; English	\$A0.38-0.96 hour
Vanuatu	80	L=11,880sq kms S=not available	140,154	1980 independence	Bislama; Eng.; French	N/available
Western Samoa	2 large many sm.	L=2,900sq kms S=n/available	162,300	1962 independence	Samoa; Eng.	\$WS0.40hr

<sup>1</sup> Information is obtained from the 16th edition of the Pacific Islands Yearbook, 1989, edited by Norman and Ngaire Douglas. Dates of their sources vary from as early as the 1970s to the 1980s according to their official availability so that in some cases official information is quite dated.

The multi-ethnicity represented by these language groups also reflects the cultural diversity of the Region. Typically, indigenous cultures of the Region are based on the extended family and a communal way of life regulated by communal obligations. In the more developed countries of the Region, this way of life exists side by side with Asian and Western cultures favouring nuclear family existence and ethics of independence and individual enhancement.

#### **1.4.2 Political and economic diversity**

When the creation of the University was being considered in the late 1960s, the Region as a whole was characterised by scarce natural resources, an underdeveloped economy and an inadequate and poorly-developed transport and communication infrastructure on which much of the success of a regional venture would necessarily depend. However, a combination of factors of size, geographical location, colonial experience, natural resource endowment and size of population has continued to favour some countries over others in terms of economic growth, national development and per capita income. This imbalance among USP countries represents a significant dimension of diversity in the USP Region in terms of its total demand for education and training and the quality of the trainees as university students. Historically, nations of the Region have had some form of colonial, protectorate or international trustee relationship with different metropolitan countries (see Figure 1.1). With regard to the smaller countries of the Region this relationship continues to exist largely in terms of economic aid to assist national development following the attainment of self-government by these countries. The larger countries, notably Fiji, are dependent to a lesser degree on foreign aid for national and economic growth (Douglas and Douglas, 1989). In 1983, speaking at the Conference on Future Directions for the USP, national representatives of USP member countries brought a range of requests for training and educational assistance from the USI that reflected variations in national growth and standards of economic achievement in each of the countries of the USP Region. Within the same conference, while Fiji, the largest, most advanced country of the Region, pushed for specialist training for its broad-based labour force in both the public and private sectors, the Tokelauns requested simply that their civil servants be given the minimum amount of training that would qualify them for the various positions that they already held in the civil service (USP Future Directions Conference, 1983, USP: Suva). It is noteworthy that the training/education dichotomy

continues to influence the direction of the University and raises again the question of the readiness of the Region for a university at the time of its establishment.

### **1.4.3 Education**

Remnants, in varying degrees, of British, French, American, and relatively recently, of Australian and predominantly New Zealand educational influences, have remained in the formal education systems and curricula of the countries of the Region, contributing to variations in philosophy and approach to formal education across nations. By the beginning of the 1980s all but two of the countries of the Region had attained independence and self-governing status. As far as possible, curricula have been adapted towards facilitating national development and identity with an increasing focus on local economic and social needs although again largely with the expertise of foreign specialists. In spite of this trend, whilst the larger countries of the Region can cope adequately with the Primary and most of the Secondary education needs of their populations, a number of the smaller countries continue to use their historical links within the Region and with metropolitan countries to cater particularly for secondary education for some of their youth who are sent abroad to live and study for a number of years. All of the countries of the Region, including Fiji to a much lesser degree, have opted for the USP Foundation programme (equivalent to the final year of high school) as part of, or to supplement their own national high school systems. The bulk of Fiji students now enter the University through national seventh form qualifications. Equivalent qualifications from other institutions are also recognised as fulfilling USP entry requirements.

## **1.5 The Development of Distance Education at USP: A Brief History**

Considering the diversity of the Region and its variations in educational, economic and national development, Renwick et al. (1991), commented: "To envisage the successful creation of a university in these circumstances called for a leap of faith" (p. 2).

The leap was taken in 1968 when the University was established with its main campus (Laucala Campus) in Suva, Fiji. A second, agricultural campus, was opened later in 1977 at Alafua, Western Samoa. To these campuses came mainly full-time students to undertake courses towards diplomas and degrees in arts, science, education and agriculture. The first courses in the distance mode for the Diploma in Education followed in 1971. Extension Services, as it was known then, created in 1970 to serve the University's regional outreach efforts, was given the task of administering the USP's distance education programme (also referred to as its extension programme) as part of this outreach.

The spectacular growth of this programme since then can only attest to its suitability and appropriateness not only in carrying out the main purpose of the USP to be a university "... regional in character as well as mission" (Renwick et al., 1991: 3) but also for students caught in the circumstances prevailing of distance, small scattered populations, low income levels, and the high cost (in broad economic and social terms) of full-time enrolment at Laucala and Alafua. Distance education, with its focus on independent learning, also had the distinct advantage of being adaptable for students living on outer islands and remote rural areas and villages within the USP Region. Now in its 24th year of offer, the USP's distance education programme has registered a phenomenal growth rate particularly in the 1980s when it went from 1256 enrolments in 1980, 4055 in 1987 to 7100 by 1990. This increase accounted for 35.7 percent of the University's Equivalent Full-time Students (EFTS). In 1980 30 courses were being offered in the distance mode across a range of disciplines, the number exploding to more than 150 courses by the end of the decade. (Renwick et al., p.32).

However, although this growth has done much to establish the USP's distance education programme as an integral function of the University, its occurrence in the 1980s in a period of recession and budget freeze meant that it was not accompanied by an appropriate increase in resources over the better part of the decade. More importantly, the pressures on the University to continue to meet the increasing demand for its services by countries seeing education as a way out of the recession, within a severely restricted budget, meant setting priorities and taking restrictive measures wherever it could. Inevitably, by the end of the 80s not only were course and enrolment restrictions necessary to allow Extension Services, now University Extension, to cope with the logistics of the vastly expanded programme, concern over the quality of offerings and

student support, and the effectiveness of administrative functions led to a request by University Extension to the University that its distance education policies, strategies and activities be reviewed before any further development took place (Wallace, 1990:14). In many respects, various features in the development of the USP's distance education programme such as its increasing popularity as an alternative mode of learning for those unable and/or unwilling to attend traditional campuses, and the related budgetary and management concerns are issues of distance education worldwide.

The Review of the USP's distance education programme was funded by the Commonwealth of Learning (COL), Vancouver, Canada, and carried out by an international team of consultants in 1989. Their report was presented in 1991. It confirmed the vital role that distance education had played and would continue to play in establishing the concept of USP as a regional university. Furthermore, it observed that much of the development in the first 20 years of the University had inevitably focussed on three main areas:

1. institutional matters of management policy involving budget and staffing primarily, and the logistics of coping with a region of its size, expanse and level of economic development;
2. the development of an adaptable and flexible teaching programme and the maintenance and improvement of its delivery; and
3. efforts towards the improvement of the quality of teaching.

Much of the direction for this development came by way of regional conferences mounted at intervals by the University in its effort to seek counsel from its member countries on how best to carry out its role in the appropriate and relevant

maintenance, advancement, dissemination of knowledge by teaching, consultancy and research and ... the provision at appropriate levels of education and training responsive to the well-being and needs of the communities of the South Pacific (University charter).

Five years into its existence, the University held a seminar on the theme What kind of University for the South Pacific? The variety of viewpoints and discussion which was represented at this seminar clearly reflected the dilemma that prompted the University's call for direction. Attended

not only by leaders in education but by consumers of education in both the public and private sectors, and representatives of regional economic and religious institutions, the participants represented a diversity of educational needs across the then eleven member countries of the Region, as well as throughout the social and economic hierarchies of individual nations. Viewpoints on the *raison d'être* of the University ranged from those with a political and economic bias seeking to direct USP towards a predominantly manpower training role, to those directly opposed to this utilitarianism, arguing instead for the traditional role of a university as the perpetuator of an appreciation for education and learning as valuable in themselves. Yet a third group pressed for the pursuit of both goals to exist in a teaching structure that would begin with a vocational bias and culminate in degrees and higher order educational achievements. There was talk also of the 'multi-purpose' graduate especially dedicated to the community and its needs as the price for the privilege of higher education. It was clear, however, that the fundamental tussle in this meeting was one which sought to determine the locus of control for decision-making for USP - did it lie within the University as an autonomous institution, or externally among the countries constituting its membership and contributing its finances and resources?

By 1979, from the report of the Tenth Anniversary Review Committee, constituted to review the progress of the University in its first ten years of existence and to offer recommendations for its future development, it was clear that USP had succumbed, to a large extent, to pressures from regional countries to concentrate on meeting their various manpower needs. Given the limited resources available and the demand implications of this task across the Region, it was inherent in this instrumental approach that the situation observed by Futa Helu, representing the Atenisi Institute, Tonga, at the 1973 seminar, "... as things are at present, social demands have altogether eclipsed the educational demands" (Seminar on What Kind of University for the South Pacific, USP, 1973), would be perpetuated. Indeed, although the need for a holistic approach to education with a focus on personal growth, quality of life and attitudes of self-sufficiency was beginning to gain recognition, the general focus of the Regional Conference on Future Directions for the USP held at the University in December, 1983, was the shifting pattern of regional manpower needs and the need for the University to shift with it. Dominated by the theme of national development, which by the 1980s had the additional dimension of the gaining of independence by a number of countries, USP understandably appears to have lost track of a holistic approach to its educational function as much in regard to its distance education programme as to its on-



campus offering. It had not the philosophical or the policy orientation nor the resources to move beyond the provision of 'relevant' courses as and when they were needed by its member countries in both its on-campus provision and distance education programme whose growth, by now, was beginning to outpace the ability of University Extension to cope with it. Not surprisingly, the COL Review team noted that

... from our examination of the many components which, taken together are USP's Extension Services, it is clear to us that the University's policy for its effective management has not kept pace with the explosive developments that have themselves been the result of general university policies during the last decade. It is managing Extension Services as if it were an optional extra - a desirable adjunct - to its teaching mission (p. 47).

## **1.6 The Student Dimension**

### **1.6.1 Some significant considerations**

Aside from attempts at an infrastructural support of its distance teaching function, one consequence of this situation is the fact that little attempt that can be described as appropriate and effective, has been made to incorporate the student dimension directly or indirectly, as an integral part of its distance programme and policy. A significant element of the student dimension is the diversity of the backgrounds and contexts from which students are drawn. Two immediate and obvious consequences of this feature are the need for USP to accommodate this diversity if it is to be an effective provider of higher level manpower training and education in the Region, and the need for specific strategies which would promote equal opportunity for higher education among all communities within its ambit of responsibility. Although the diversity of the Region and its implications for the University and its activities are generally recognised, there is no evidence in the approach of the University to distance education that its significance has been fully appreciated. To date, for instance, there has been no significant research looking into the nature of this diversity as it relates to the Region as a whole and its consequences for and on the population from which USP draws its students.

A second, equally significant feature of the student dimension of the USP distance education programme is the predominantly adult nature of its student intake. Given that the bulk of its students are adults, the USP's distance education programme is essentially one of adult education involving adults coming to their studies from a variety of backgrounds. Cross (1981) wrote "... if adult education is a distinctive field of study at all, it is adult learners who make it so" (p. 222).

The upsurge in the literature within the last three decades, of theories and empirical studies focussing on the adult learner, and more recently on adults learning at a distance, testifies to the increasing realisation that adults differ markedly as learners from children and adolescents in their ethos, approach to and reasons for learning. Andragogy, for instance, one of the best known sets of principles of adult learning, is premised on four crucial assumptions about the characteristics of adult learners that are different from assumptions about learning as children (Knowles, 1990:195). Humanists such as Rogers, Maslow and Jourard writing in the 1960s and 1970s, described adult learning as largely a process of self-actualization in which adults are self-motivated towards educational goals (Ibid, pp. 8-9).

Development psychologists in the same period emphasised the important role of the environment in shaping the growth of the individual and advanced theories of interaction that formed the basis of recommended interactive learning for adults at various stages and phases of life (Cross, 1981: 229). This interactionist approach towards understanding the adult learner as a whole person whose

... learning activities are affected by every aspect of the individual, not just by a set of attributes and abilities which are abstracted for the purpose of undertaking specific learning tasks (Kelly and Shapcott, 1987: 5),

has gained momentum in recent years. Its popularity can perhaps best be attributed to the practical value that such studies have for course development and instructional design in indicating the position of the students with regard to learning need and preparedness. Various approaches to determine the extent to which variables in the students' environment contributed to motivation, disposition to study and performance marked the efforts of the late 1970s and 1980s. In a thought-provoking discussion of selected research in this area, Gibson (1990) examined the work of

researchers on the basis of Kurt Lewin's (1935) formula of  $B = f(P,E)$ , where B represented learning and learning-related behaviours P being the adult distance learner including such features as his/her learning style, motivation, prerequisite knowledge and skills, and E representing the learner's environment which would contain elements such as significant others, his/her work and vocation and the educational environment. The range of personal variables examined included demographic data, students' perception of academic ability, cognitive personality style or behaviour, learning styles and motivation, field dependence/independence and personality. A significant variable in the student's life space was the educational environment and the extent to which it could and should be modified and enhanced by the quality and range of services to improve motivation and success rates.

It was also clear from the 1970's that distance education was especially attractive to the adult population for the purpose of keeping up with work challenges caused by the technological and knowledge explosion of the latter half of the twentieth century. Yet it was not until the creation of the Course Development Unit (CDU) at USP in 1982, with the special task of ensuring effective instructional design for distance learning, that the adult USP extension student began to attract appropriate attention. One of the problems easily associated with a dual-mode institution like USP is the risk that the same principles and strategies used in the teaching of the course to young, full-time undergraduate students with no previous job experience, and continuing straight on to tertiary study from secondary school, would be followed in the distance mode for a primarily adult, part-time extension clientele. Indeed, Coldeway (1982) boldly declared that

much of the content of distance learning is taken from traditional campuses and distance learning institutions have never intended to be different from traditional institutions except by "doing it at a distance" (p. 91).

He went on to indicate that "almost everyone has grown up in a pedagogical system and overcoming this long term indoctrination into pedagogy would require much attention"; furthermore that "the evidence and logic of (Andragogy) demands that it be considered by distance educators" (p. 91).

By virtue of their maturity and the richer experience of life and employment derived largely from the interaction of personal and environmental variables on a daily basis, adults were inclined to

be more aware of the purposes and kind of education they wanted in their lives. They were usually self-motivating towards learning; that had more immediate, and practical use and which drew upon the adult's experience as a good part of its foundation. Research in a variety of adult education settings has produced much work on these qualities and characteristics of adult learning.

Aside from contributing to a theoretical base about the adult distance learner that may have universal application, such studies have also produced discrepancies which have led to questions about the kind of environmental conditions that provoke the various potential roles that these variables can play - antecedent, mediating, intervening - in the lives of the students. Furthermore, what degree of influence will they have, taken individually, or in combinations, when related to other students in different educational settings? That efforts at pulling together research on the adult learner and adult learners at a distance within more natural settings are beginning to confirm the importance of the environment in influencing the adult students' motivation and disposition towards learning, there can be no question. Gibson's (1990) recommendations for the continuation of such studies towards the establishment of a model encompassing the personal and situational circumstances of the adult distance learner, his/her educational environment extending beyond the institution to the broader context in which the learner exists, and the relationships which exist between and among these variables (p. 32), are appropriate for a more widely applicable and effective theoretical foundation on adults as distance learners. Such a foundation, Gibson also implicitly suggests, will challenge theories of distance education that do not incorporate environmental variables as significant determinants of effective adult learning.

### **1.6.2 Direct and indirect effects of the instrumental approach on the student dimension**

The task of meeting educational needs in the context of the USP makes unique demands on the institution in that these needs are those of twelve member nations most of which, since the beginning of the University and into the 1980s, achieved independence or self-governing status. These changing political orientations were accompanied by redefined economic and social goals that translated themselves into a variety of educational needs over this period of time, to be met by the USP. Given the economic and social variations represented by the various sizes and populations of the countries of the USP Region, and given that economic conditions are never

static, it is reasonable to expect that the demands of responding to educational needs in the USP context would continue to require constant attention, time and resources. It would also make highly likely the situation that Regional governments and other employers will continue to exert a high influence on the future trends of the University.

In addition to the constant need to address and reflect these changes in its educational programmes, the University has also faced challenges generated by political pressures unique to its Region. For instance, the issue of control over the decision-making process, mentioned earlier, is a multi-dimensional one involving the University as an autonomous institution, its member countries, and among these, the larger more dominant countries and the smaller, less influential members. Decisions of the University were, and are, often a reflection of the ability of larger member countries to hold sway over the decision-making process in their favour rather than based on common regional interests.

Coupled with such political pressures, academic ambivalence and prejudice among many of the teaching staff of the University with regard to its distance education function continue to be dominating influences in the developmental approach taken by the University. Much of this bias can also be linked to the fact that about 50 percent of these staff are foreign to the Region and are therefore unfamiliar with the teaching and learning context and its special needs. These pressures and circumstances make additional and special demands of the University to the extent where the needs of adult distance students, in a more holistic context, seem likely to continue as a marginal concern for the University, in much the same way as University Extension has been relegated to 'optional extra' status among the activities of the University (Renwick et al., p. 47). An examination of some of the efforts by the USP to support its distance education programme and distance students in particular, will exemplify and demonstrate this trend, and the tendency, over time, for it to become more entrenched as other pressing priorities emerge:

### **1. Dual-mode teaching**

The University adopted, at the very outset, the dual mode system of teaching with the specific objective "...to involve teachers on-campus in the wider Region, to help them become familiar with its diverse needs and adapt their teaching accordingly" (Renwick et al., p.11). Such an approach had additional justification in the fact that in the earlier years

of the University more than 50 percent of its academics were recruited from beyond the Region. Currently, the staffing situation is balanced between regional and non-regional teaching staff.

As a result of its high percentage of overseas staff, USP has a high staff turnover, with a recent survey showing 40 percent of the teaching staff staying for less than 1 year and 60 percent less than two years of their teaching contracts (Ibid, pp. 59-60). The objective of dual-mode teaching therefore occurs very little in practice. Many of the teaching staff do not stay long enough for the effects of being involved in dual-mode teaching to benefit their extension courses. Furthermore, this experience, limited though it is, leaves with them at the end of their contracts and there is little obligation for succeeding members of staff to pick up where predecessors left off. Thus, there is no onus upon staff to deal with issues of diversity in course delivery that would promote effectiveness by way of ensuring that the education of adult distance students is appropriate for them. Much of the work of accumulating regional experience, and addressing issues of diversity and equal opportunity, although this is currently still far from being satisfactory, has been and continues to be conducted by the Course Development Unit, now the Distance Education Unit (DEU) at University Extension since 1982 more as a matter of relevance and significance to its work rather than by university policy decree. This situation is borne out by the researcher from several years of experience initially as a Course Developer and more recently as the substantive Co-ordinator for Instructional Design and Development within the Distance Education Unit. This situation is far from ideal in that much is left to collegial goodwill and co-operation that can come under severe stress in a context where distance education is not treated with high priority among the many other responsibilities of the teaching staff.

## **2. Locus of direction and responsibility**

This, and other initiatives for distance teaching and learning currently rest with teachers in the Schools in association with University Extension rather than on a clearly defined policy for the management and development of distance education based on an appropriate philosophy of education. The COL Review Report points out "...it is not clear why some courses have been developed and not others, or how they relate to overall academic policy" (p.98).

Because USP's distance education programme has been driven by the various manpower training needs of the countries of the Region, it has focussed largely on programme expansion, and course delivery and teaching support, in its bid to carry out its mission of providing higher education for the Region. There is no question that it has risen admirably to this task. For example, since the 1980s a new Certificate and Diploma structure with 50 percent cross-credit possibilities to higher level qualifications has opened university study to people in new occupational groups and provided for a wider range of manpower training for distance students. The late 70s marked a beginning in the improvement of the technical standards of presentation of course materials and in 1982 the DEU was established to be responsible for course design, development and preparation specifically for distance students. However, as has been noted by the COI Review, the current absence of a distance education policy and programme plan has led to the ad hoc mounting of courses by various departments, some not offering any courses at all. Of more concern is the resulting ambiguity about the locus of ultimate responsibility for the quality of courses and the assurance that courses supporting programmes of study at a distance will continue to be offered within reasonable timeframes.

What has also clearly been lacking is a distance education philosophical base generating decisions about course provision and delivery. In the case of the USP, such a philosophy is necessary for the appropriate direction of the University through issues such as foreign influence, the training/education dichotomy and consumer research. Some of the speakers at the 1983 Future Directions conference questioned the true purpose of the University - higher education or manpower training - and Futa Helu of the 'Atenisi Institute in Tonga summed up the general feeling of this small group in his statement:

A university whose aims and policy guidelines are solely inspired by the desires and perceptions of external forces, whether sponsoring governments or aid donors, cannot be much of an institution and cannot hold much for the future of education of the communities it is supposed to serve (Report on Regional conference on future directions for the University of the South Pacific, 1983: 152).

Whereas the chartered responsibility of the University to respond to regional needs has been implemented, this task has been too narrowly interpreted and overlooks the learning needs of students as individuals and as an integral part of the educational process whether

in pursuit of manpower training or of education in itself. In this respect, the USP appears to share a trend common to university education worldwide. Conspicuous by its rarity at USP is the research work, both theoretical and evaluative, that is necessary in order to ensure that the distance teaching effort, as much as the on-campus effort, is effective in terms of learning objectives. Another significant function of the DEU since 1982 has been to put in place a corps of distance education professionals specialising, in particular, in instructional design for regional students. The fact that the academic nature of this work and consequently the academic status of its staff have been debated until very recently, may well attest to the ambivalence with which the University perceives its responsibility towards its extension students. The absence of university policy clearly determining the work, function and authority of the DEU in relation to other units of the University has given rise to a situation where much energy and time have been expended by the staff of the DEU in defence of their role and status as distance instructional designers. Consequently, the creative and professional possibilities of the unit are continuously being eroded and the potential of the staff to contribute to the quality of teaching and learning by distance, diminished. Furthermore, the growth of the distance education programme has led to increases in workloads that have encroached on time to undertake research and other professional development activities, locking the instructional design and development staff into a catch 22 situation with regard to consolidating their academic roles within the university structure. Unless the USP puts in place appropriate policy and opportunity to ensure the proper functioning of the DEU as a professional and academic unit of the University, this initiative can be interpreted as mere tokenism towards meeting the learning needs of extension students.

### **3. Mature entry policy**

Closely allied to the function of manpower training is the USP's mature entry policy which recognises the large number of adults in the workforce who either missed out on earlier opportunities for higher education or now need to upgrade qualifications or both. The creation of further dimensions of diversity for the University by this policy does not appear to have been fully appreciated. Inherent in any group of adults are differentials in employment, social and educational experiences and in marital and family status, among other variables, all the subject of a separate body of literature on adult learners which



recognises these differences as they relate to learning orientation, strategies and motivation. There is little evidence in USP's approach to distance teaching that any consideration given to the teaching of its adult students is based on sound principles of adult learning.

#### **4. Multi-media course packages**

In 1978 a satellite communication network which began in an experimental way in 1971, was consolidated primarily for the continued facilitation of administering the distance programme across the Region. It was also intended to provide tutorial support for students within reach of the satellite network. In the following year, with the establishment of the Learning Resources Unit (now part of the University Media Unit), the University looked forward to the development of multi-media learning packages enhanced, in a limited way, by satellite tutorials and radio programmes. These initiatives were indeed stimulated by a recognition of the diversity of learning needs represented by Regional students and specifically by the difficulties that the largely English as a Second Language (ESL) students had with written English. Although laudable in their intentions, these developments were, at best, assumptive, clearly lacking in an appropriate and relevant knowledge base of the nature of this diversity that would have contributed to their effectiveness. Thus, without the precedent of feasibility or impact analyses studies for a Region characterised by poor communications and media technology, and inexperienced users, the years have shown the satellite network, limited as it was to the few students who had access to it, to be more usefully a medium for lecturing purposes rather than for the opportunity for active interaction between teacher and students, and students and students (Williams and Gillard, 1986). Both the satellite tutorial support programme and multi-media approaches to distance teaching were established on the basis of their successful use particularly by institutions in developed countries. In the case of USP, not only was their relevance untested, they were reactive and add-on elements (Renwick et al., 1991:50), rather than integral to the teaching/learning processes, designed as ad hoc responses to forestall further failure and attrition among extension students. Their continued existence attest not to their proven effectiveness but to stop-gap attempts by a university that has not prioritised resources and the appropriate knowledge and expertise to advise and provide more substantial measures. Hence, failure rates continue to be high and research is much

needed to direct these technologies more realistically and effectively towards the peculiar needs of students of the USP Region.

## **5. The local USP Centre**

The establishment of local USP Centres in as many regional countries as possible, staffed and equipped by the University from the early 1970s and into the 1980s was another initiative based on the recognition that there would be local differences that would be best catered for at a local level. It also had a political objective in the attempt to provide a physical presence of the University in individual countries of the Region. In support of its distance education programme, each Centre has classrooms, a small library of reference materials largely supplementary to course packages, a general science laboratory, computer and satellite facilities, and the capacity to hire part-time local tutors and markers which varies from country to country.

Aside from administrative and academic conditions to which all USP students are subject, each Centre enjoys a semi-autonomous existence which allows it to be entrepreneurial and innovative within university guidelines. The Centres also make information about the University available locally, and transmit information about local needs to the University, as well as evaluative reports about the Centre's ability to successfully support its extension courses and students.

However, as much as this move assists the University's ability to cope with diversity, it has created its own additional problems. Economically, politically and socially, and with respect to levels and rates of national development, some countries are more suited and able to offer a wider range of student support facilities and opportunities than others. This has led to inequitable treatment of students by the various Centres across the Region, and a further factor of diversity that the University has to contend with in terms of its course development and delivery policies.

The question must also be raised about the University's disposition to receive information about local needs via its Centres and to act upon it. In November 1984, Cook Islands

Centre Director John Herrmann. in response to concerns raised about high failure rates, made a plea for the recognition of the special needs of the extension students. He said,

...in extension teaching, the university is in fact dealing with a student whose needs and attitudes are considerably different from those of one on-campus. And for 90 percent of the extension students it would be fairly accurate to say that they would not give continuing priority consideration to their studies. Most of them are employed for 8 hours a day. They are planters, housewives, and sportsmen who also have community and extended family obligations to attend to.... Needless to say it becomes decidedly difficult for a student to concentrate and maintain a positive attitude towards his studies, in such circumstances (Herrmann, J.J., 1984).

Herrmann also pointed out the additional difficulties of adjusting to self-study and independent learning, new concepts in education for many of the students involved in USP's distance education programme. While Herrmann's observations cannot lay claim to having a scientific base, his long experience as a practising academic in distance education in the South Pacific lends soundness and relevance to the points he makes and calls attention to the need for the University to seriously address the special needs of its distance students, particularly those born out of issues of diversity.

The whole development of the USP's distance education programme has been marked by a top-down approach, expressed through a one-sided institutional focus on what and how best to teach, more than to learn, through the distance medium. As pressures mount for the delivery of more courses and programmes by Extension, the need to take the learner into consideration as part of a more holistic approach to its distance education effort seems to recede further into the background. Initiatives discussed so far reflect a reactive approach to specific needs as they arose and the absence of a development policy based on an educational philosophy has been noted by the authors of the COL Review Report. Its recommendations that

... an enhanced telecommunication network, phone-in opportunities for students who are unable to travel to university centres, a greater reliance on local tutors and more use of summer schools have the potential to make students' learning more effective, and by so doing, reduce drop-out rates, increase pass percentages, increase the number of students completing degrees and diplomas and reduce the time it takes them to do so (Renwick et al., p. 107),

are significant in that they are put as testable hypotheses. This confirms that there is much about the USP distance education student within his/her broad study context that is as yet unknown. It

also implies that without this knowledge, any initiative to enhance distance education will, at best, be speculative and run the risk of being misdirected and misguided.

## **1.7 The Study Problem**

### **1.7.1 The concerns of the study**

This study has been stimulated by a variety of concerns:

1. In the growth and development of the USP, the pressure to provide higher education to a region dominated more by differences than by similarities, and by poorly developed economies and limited resources, has forced the University into an instrumental role of manpower training for national development. Pressure from the need to continue to meet changing educational demands over the years, as well as from Regional politics and the politics of a dual-mode institution, has caused it, over the years, to relegate its extension programme to a position of desirable but optional activity among its many other commitments. Thus, the COL Review Report has noted the lack of a development policy to guide the growth of the extension programme, and the absence of a philosophy of education on which to base its teaching/learning approaches and strategies. As a result, there have not been adequate and appropriate time, resources or attention allocated to the student dimension of the distance education programme and specifically to the task of fully understanding the distance learners and their specific needs as adults coming from diverse backgrounds and environments across the USP Region.

This oversight may have some degree of impact upon the performance of students within the courses and programmes offered by the University for two main reasons:

- (a) Because the students come from diverse physical, socio-cultural, economic, political and educational backgrounds, their higher educational needs must reflect this diversity.

- (b) In such divergent personal, situational and study contexts, environmental variables bearing directly or indirectly on students' dispositions and opportunities to learn will differ and will exert varying influences on students across the Region.
2. In addition to the knowledge about influential environmental factors within the personal, situational and study contexts of extension students, there is a need to know the extent and strength of the influence that these variables or combinations of variables bring to bear on the students' dispositions to learn. Specifically, from what kind of background and under what circumstances are students more inclined to learn effectively and efficiently; which variables, singly or in conjunction with others, pose barriers to learning that need to be considered and surmounted in the design and development of extension courses?

Unless USP extension courses are designed and structured to accommodate these differences, they will not meet the needs posed by the personal and environmental circumstances of many students and may therefore discourage persistence and successful performance by students taking into consideration the principles of 'whole person learning'.

3. The bulk of USP's distance learners are adults. In view of the current knowledge about the specific educational requirements and learning strategies of adult students, it is necessary that courses for adults give due consideration to the principles of adult learning (andragogy) in order to be effective. The third concern of this study relates to the extent to which efforts at distance teaching at USP have been guided by andragogical principles. Again, with the focus of the distance education programme being on responding to the training needs of regional countries, programmes and delivery are characterised more by the aim to increase knowledge and upgrade qualifications in specific vocational areas from an employer perspective rather than from a student point of view.
4. Finally, to what extent has this lack of understanding of the distance learner as an adult and from a 'whole person' perspective influenced the opportunities within a course for student persistence and successful performance. What variables constituting the world of the adult distance learners at USP can be identified as correlates of persistence and

success. There is, in fact, due recognition of the necessity of this information in the claimed existence of a development philosophy for extension studies contained in the University Extension Annual Report, 1993,

... to which most departments and University have historically subscribed:

that a student studying through the distance mode shall normally be provided with teaching/learning packages which, in themselves have been designed to enable him/her to succeed in the mastery and passing of the course. These packages shall, to the fullest extent, comprise instructional strategies and media appropriate to the known student market (researcher's underlining) and the general 'standalone' policy (p. 19).

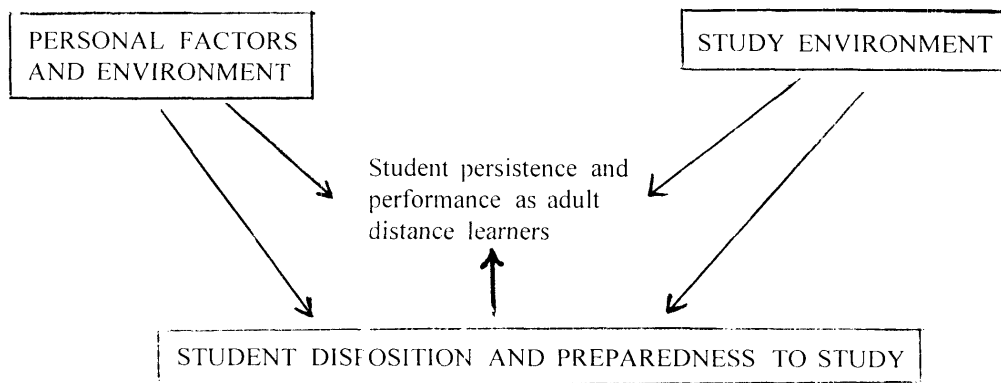
A relevant and significant question here is the extent to which this market is, in fact, known to instructional designers and distance educators at USP given the dearth of research on the USP distance learner. It has seemed more likely the case that course development at the USP has been based on an ad hoc aggregation of knowledge and experience about the USP distance education context and students derived from pooling together the piecemeal knowledge and experience of course writers from the Schools and the instructional designers at University Extension. This situation can, quite easily, over the years, become accepted as sufficient for the purpose of fulfilling the requirements of such a development philosophy of extension studies although it does little to substitute for a philosophy of education based on sound adult distance education principles and substantial, empirical knowledge about the USP distance learner.

The answers to the concerns cited and implicit above, will, no doubt, make a significant contribution to the development of more effective USP extension courses, geared specifically for adult distance learners, coming as they do now, from divergent and heterogeneous backgrounds.

### **1.7.2 Study Objective and Questions**

The conceptual framework of this study is based on principles of adult learning at a distance discussed earlier in this chapter, incorporating humanist and development theories and concepts on which they have been founded and presented in Figure 1.2 as follows:

**Figure 1.2: Conceptual Framework of Study**



—— Inferred direction of effect  
 - - - - Geographical association

**PERSONAL FACTORS AND ENVIRONMENT**

- demography
- socio-cultural
- economic
- educational background
- present educational involvement

**STUDY ENVIRONMENT**

- institution
- physical facilities resources
- information : quality and flow
- motivational support
- national physical facil. & resources
- infrastructure
- learning opportunities
- society/community
- home

**STUDENT DISPOSITION AND PREPAREDNESS TO STUDY**

- self-perception & confidence
- developmt. as a learner
- motivation
- orientation to learning
- approach to learning
- language skills

This study is exploratory in nature for three specific reasons: its physical scope encompassing the USP Region from which its population is drawn, the wide range of variables under investigation, and the fact that for this particular context, there has not been a precedental investigation of similar scope and nature. The study seeks to examine the adult distance students at USP in the context of the USP Region and to explore a range of variables within this context with the intent of identifying among them those that are significant in affecting learning and studying at a distance. The main thrust of this exercise will be the application of principles of adult learning currently contained in the literature to adult distance learners in the specific context of the USP Region. In particular, an assessment of the significance of personal, situational and study

environment variables and the kinds of influence they exert on the learning of these adults in their various locations in the USP Region, will be investigated. Also of significance to the objectives of this study is the profiling of characteristics and attributes of adult distance learners at USP, and the examination of the extent to which they are influenced by environmental conditions prevailing in the context of the USP Region. It is envisaged that not only will such findings contribute further to a theoretical base about the adult distance learner that might have universal application, they will also highlight variations that are caused by different educational settings not currently sufficiently accounted for by adult learning theory, and challenge theories of distance education that do not incorporate environmental variables as significant determinants of effective adult learning. The objectives of this study are contained in the following study objective and questions:

**Study Objective:** Data collected will be used to produce a profile of the typical distance student enrolled in the Diploma in Management Studies (DMS), and the Diploma in Accounting Studies (DACS) at the USP, taking into account answers to the following study questions.

**Study Question 1:** As adult learners, and with regard to theory and principles of adult learning, are these students

- self-directing and independent in their learning orientation;
- highly and intrinsically motivated;
- confident in their self-perception as students;
- preferring courses which are experienced-based and oriented towards problem-solving

in their disposition to learning?

**Study Question 2:** To what extent do personal and environmental variables influence this disposition and the preparedness of these adult learners to complete, and perform successfully in their extension courses?

**Study Question 3:** Are dispositional variables (motivation, confidence and attitude to study) and variables of learning preparedness (transition to distance and tertiary education, learning orientation, learning style/skills) good indicators of performance?



## **1.8 Concluding Summary**

This chapter has provided a historical discussion of the development of the USP and the purpose of its distance education programme within this development. It has shown how pressure from its member countries to rise to high manpower training demands has led it away from concerns about the quality of learning of its distance students. Issues of diversity related to the personal, situational and educational environment of these students indicate differences in learning need among them that must have an impact on the quality of their learning. However, the 'neglect' of the student dimension in the USP's distance education programme discussed in relation to features of its development within the context of the USP Region and institutional development, gives rise to the concerns, objectives and questions of this study.

## **CHAPTER 2 : REVIEW OF THE LITERATURE**

### **2.1 Outline of Chapter 2**

Chapter 2 examines the literature with regard to the various areas significant to the thesis topic. It begins with a history of the USP, focussing especially on the reasons and circumstances for its creation, its development and evolution into an institution for manpower training in the Region. This chapter also looks at the development of University Extension as an attempt to make university education accessible across the Region and in so doing, enhance the regional image of the USP. The literature depicts the phenomenal growth rate of University Extension reflecting the appropriateness of this mode of study for the distances of the Region and circumstances of its population. However, initiatives towards making distance education effective for its learners have been either ill-thought out or lacking, particularly in terms of the education of adults. Literature on the principles of adult learning both theoretical and empirical is discussed, and their application to distance education with particular reference to the USP context, is examined. The chapter concludes with a brief comment on the current state of the USP distance education programme and its present developmental emphases.

### **2.2 The University of the South Pacific : Regional Diversity and its Educational Challenges for the University**

#### **2.2.1 Arguing for a regional university**

The idea of a regional university in the South Pacific was based largely on two arguments by Morris (1966: 20): that among the countries of the South Pacific Region, "general situations bear sufficient similarities to allow some degree of common consideration", and that the fact of smallness in size of many of the countries of the Region meant that only through joint regional effort at meeting educational and training needs of these countries would such a venture become economically viable. There were several reasons for the necessity of local higher level education.

and most prominent were the "development and modernisation processes begun by colonial governments, and the manpower training required to sustain political independence that was approaching for those countries of the Region not already self-governing" (Tuimaleali'ifano, 1993: 281).

However, both Morris, and Alexander (Legislative Council of Fiji, 1967), in arguing for the creation of the University of the South Pacific in 1968, recognised that the differences prevailing among the countries of the South Pacific would give rise to unique educational and training challenges for the university. Reports produced by Morris and Alexander were direct and indirect results, respectively, of the Higher Education Mission to the South Pacific, led by Sir Charles (later Lord) Morris, "to enquire into the various suggestions which had been made in the past for the provision of higher education in the Region" (Report of the Higher Education Mission to the South Pacific, 1966: 9).

That the Mission was the result of talks in London between representatives of the British and New Zealand Governments, and included a representative of the Australian government, clearly marks the colonial influence on, and in particular the continuation of British educational traditions into higher level education in the South Pacific, conceptually foreign, therefore, to the cultures of the peoples of the South Pacific. In addition, the University was created in spite of the debate at the time on the readiness of the Region for university level education and whether it would have been more appropriate to enhance local institutions then catering for regional post-secondary education, most notably the Derrick Technical Institute (now the Fiji Institute of Technology), in Suva, Fiji. In light of this debate, the USP might be seen as a legacy to British territories in the Region, argued by the parties to the Mission as a factor beneficial in both its educational intentions and cohesive qualities for the countries involved.

In Morris's report however, it is significant that several of the features of the South Pacific Region that he indicated would influence the kind of university to be established and direct its appropriate development, were features of diversity. He emphasised the geographical variations of the Region comprising "several territories, which are themselves divided into further separated

geographical entities, ... (with) close on a million people living under differing political systems and with different social environments ..." (p. 20)<sup>2</sup>.

Significant differences also discussed in the report as containing potential challenges for the provision of higher regional education, were the wide variations in language and culture, the degree of availability of trained local teachers, variations in high school provision and qualifications across the Region (see also Fairbairn, 1992), as well as the variations in the provision, even lack, of information about current and future manpower needs for the various countries concerned (pp. 13-24). That the main campus was located in Suva, Fiji (on land formerly used and donated by the Royal New Zealand Air Force), brought its own measures of inequity in the area of access to higher education in the Region. Some aspects of this inequity will be discussed throughout this chapter.

### **2.2.2 Challenges to regional university education**

All of these features, and more, and problems that they posed for a newly-established University of the South Pacific, formed the basis of regional discussions organised at intervals by the university (Seminar on What Kind of University for the South Pacific, USP, 1973; Regional Conference on Future Directions for the University of the South Pacific, USP, 1983).

The Tenth Anniversary Review Committee, constituted in 1979 to review the progress of the University in its first ten years of existence and to offer recommendations for its future development, established that the University had adopted an instrumental role in its teaching and was, by this stage, concentrating on meeting manpower training needs of the Region. By the time the Regional Conference on Future Directions for the USP was convened in December, 1983, the onus on the University to continue to respond to changing economic patterns in the Region was becoming firmly entrenched. That this was a task fraught with its own difficulties is reflected

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<sup>2</sup> See also:

1. Appendix 1 for map of the USP Region, and a brief discussion of Regional membership and geographical spread in the Introduction and Background to Chapter 1.
2. Tuimaleali'ifano (1993) for a more detailed discussion of regional diversity.

in the fact of differential political status, economic growth and national development among the member countries of the Region. The comment made by one Conference participant that USP courses "quite often have not met the particular needs of each individual country" because they were determined to a large extent by "what the more powerful countries demand" (Proceedings of the Conference on Future Directions for the University of the South Pacific, 1983, p. 92), reflects the kind of political concerns related to differences in political and economic status among member countries. From the University's perspective, the then Vice-chancellor, Geoffrey Caston, stated that "these varying demands are not just in competition, they are often operationally incompatible with each other" (ibid, p. 34).

These circumstances have the potential to lead education into the situation where "teaching can so easily become instruction and even indoctrination rather than education" (Sewart, 1993: 124), and become institution-based at the expense of student needs (ibid, p. 126).

One significant consequence of general regional diversity, and of the distant location of the university for many potential students of the Region, was that only a small and select number of sponsored students, mainly young school-leavers, would be able to receive education at the university. For the vast potential of largely adults across all socio-economic levels there would have to be an alternative mode of teaching. In addition, a significant consideration for a regional university under these circumstances was that if its activities were concentrated in one country of the Region catering for a select group, this would do little to enhance its role and image as a regional university specifically adapted to meeting the educational needs of the peoples of the Region.

## **2.3 Distance Education at the University of the South Pacific: Meeting the regional challenges**

### **2.3.1 Background and development of the USP's distance education programme**

The USP's distance education programme was initially established in 1970 to fulfil both the above purposes - make university studies more equally accessible to the people of the Region and, in

so doing, enhance the University's regional image. In 1970, University Extension was set up, initially as part of the then School of Education, becoming a separate, semi-autonomous unit of the University in 1974 (Lockwood et al., 1988: 265), to be responsible for various aspects of the University's outreach programme including distance education. Since its establishment, distance education registered a phenomenal growth rate particularly in the 1980s (Wallace, 1990: 12), with the increase accounting for 35.7 percent Equivalent Full-time Students (EFTS) (Renwick et al., 1991: 32). Course numbers also increased greatly (Extension Services Handbooks), so that by the early 1990s the pressures on University Extension to cope with the consequences of the phenomenal growth rate of the distance education programme and the consistently increasing number of students in spite of course and enrolment restrictions, prompted a proposal by University Extension to the University for a major review of its work, related objectives and its policies before any further development took place (Wallace, 1990: 14). The review, funded by the Commonwealth of Learning (COL), Vancouver, Canada, and undertaken by an international team of consultants between 1989 and 1990, produced the first comprehensive report (COL Report) on University Extension since its inception. Apart from tracing the history, growth and development of the various aspects of the work of the unit, drawing from extensive primary sources, it also confirmed the vital role of distance education in establishing the concept of USP "...regional in character as well as mission" (p. 3) as well as its suitability and appropriateness for students caught in the circumstances prevailing of distance, small scattered populations, low income levels, and the high cost (in broad economic and social terms) of full-time enrolment at the University's two campuses in Suva, Fiji, and Apia, Western Samoa. Distance education, with its focus on independent learning, also had the distinct advantage of being adaptable for students living on outer islands and remote rural areas and villages within the USP Region.

In addition, the COL Report observed that much of the development in the first 20 years of the University had inevitably focussed on institutional matters of management involving primarily budget and staffing, the logistics of coping with a Region originally encompassing 11 island nations spread over 28 million square kilometres of ocean and on initiatives in, and the development of its teaching programmes. The latter has been largely characterised by a manpower market orientation focussing on the training needs of countries of the Region towards the improvement of workforces and economic development.

It would appear from the report, therefore, that the student perspective, and in particular policies and opportunities for effective student learning at a distance might not have received due and sufficient attention as an indirect consequence.

### **2.3.2 Carrying out the distance education function - how successful?**

If institutions reflect the circumstances of their creation, then the diversity of the USP Region and the responsibility of the University to accommodate this diversity as much as possible in its teaching programmes, were major influential factors in the purpose and development of the University's distance education programme. In discussing aspects of distance education in Asia and the South Pacific, Selim (1987) and Setiajadi (1988) point out that one of the features of most institutions in developing countries/regions would be an attempt to meet educational needs with limited resources and a fairly heavy dependence on foreign aid. In addition, the nature of the need would be different from that of developed, industrialised countries in that distance education would be providing a second chance for many for first qualifications predominantly in the vocational field for people already in jobs and seeking the know-how and skills to do them better. Thirdly, the communication infrastructure is not nearly as sophisticated or as widespread as in developed countries (see also Wallace and Tuimaleali'ifano, 1989; Taylor, 1989). In his report mentioned earlier, Alexander saw that for the USP these features would pose special problems that would call for special measures and that the precedents from more developed countries did not necessarily apply (in Renwick et al., 1991: 4)

One of the dominating features of USP over the years as a university in a developing region has been its constant attempt to meet educational needs with limited resources. Most of the 1980s, for instance, were marked by an economic freeze on its recurrent budget although the educational needs of the Region continued to grow. Understandably such circumstances force a preoccupation with the institutions's ability to cope with both the management of teaching and teaching support systems and the delivery of courses. The COL Report on the work of University Extension contain recommendations (6 and 7 in particular) that indicate that not only are these perspectives predominant in the work of University Extension, much work still needs to be done in order to improve institutional and teaching support matters (pp. 48, 50), let alone allow room and resources

for the development and adaptation of programmes of study in order to incorporate in earnest the practical implications of relevant principles of adult learning at a distance.

Not surprisingly, the model of distance education adopted by the USP borrows according to its specific needs and circumstances of teaching and learning from the many western models of distance education (see Keegan, 1990; Holmberg, 1986 for descriptions of these models) which were developed to explain distance education conceptualisation and operations in developed and industrialised countries. More appropriately, an eclectic model, responsive to factors of regional diversities, of limited resources and the ensuing variations in national development across the Region, of the institution, and central institutional control, and of the variation in regional educational demands, has inevitably evolved in relation to the USP's distance education programme over the years.

#### **2.4 Distance Education: a Model for the Education of Adults**

It might have been implicit in all the discussion about the diversity of the Region - geographically, socio-culturally, economically, politically, and in terms of its educational experience - that the student body being addressed would reflect this diversity in the state of preparedness with which they came to their distance study. Furthermore, given that the bulk of these students were adults, the USP's distance education programme would essentially be one of adult education involving adults coming to their studies from a variety of backgrounds and needs. Evans and Nation (1992) argue that this social aspect must be a significant component of any theory that provides the foundation for a model of distance education (see also Muller, 1989; Jarvis, 1987). The argument for this approach is based on the concept of school and schooling as instruments of society:

... schools ... are tools that were invented by human beings to meet the challenge of new social circumstances and new human aspirations. If a school is a tool, then schooling can be thought of as a technology. And like all tools and technologies, schools and schooling have changed in concert with changes elsewhere in society (Hamilton 1989b as quoted by Evans and Nation, p. 7).



The advice contained in this argument for USP's distance education programme is that for it to be a useful tool of the society that it serves, it must adequately accommodate the student dimension and its specific needs. Jarvis (1987: 193) points out that each student

brings to a teaching and learning situation a social past and this has to be recognised by the teacher. Learners cannot just throw off their social past when they enter a formal learning situation, because there is a sense in which they are, in part, that past. Their minds, their thought processes, their language, etc. all reflect that past, so that their definition of the teaching and learning situation, and their understanding of the knowledge, skills and attitudes to be learned, are affected by that past. Therefore, learners have to be recognised as people who are not totally responsible for what they are, even though all people do develop their individuality as they mature, and with it a considerable degree of autonomy, depending upon their previous experiences and their social situation.

Distance education, by virtue of the temporal and spatial flexibility it affords potential students, has generally attracted a largely adult clientele to date, and the literature has begun to address distance education synonymously with adult education (Garrison and Shale, 1990: 131). As such, it is logical to assume that distance education is based on recognition of principles of adult learning (Cross, 1981; Knowles, 1990).

#### **2.4.1 Theories and principles of adult learning**

In the last three decades theories and studies of the adult learner, and more recently on adults learning at a distance, have focussed on the differences between adults, and children and adolescents as learners. One of the outcomes of such studies is the concept of Andragogy (Knowles 1973, in Cross 1981) which is premised on four crucial assumptions about the characteristics of adult learners that are different from assumptions about learning as children. that have influenced distance education pedagogy and approach to the teaching of adults. The more widely-acknowledged of these differences and relevant to distance education, are Knowles' postulations that adults are more self-directed in their self-concept as learners, and that they draw upon their relatively wider experience of life and the workforce in approaching their learning tasks which orient them more towards problem-centred approaches to learning (Knowles, 1990: 195). Coldeway (1982) comments that

the evidence and logic of (Andragogy) demand that it be considered by distance educators (p. 91).

In an effort to "accommodate current knowledge about what we know about adults as learners", Cross (1981: 234) has produced the Characteristics of Adults as Learners (CAL) framework. Incorporating most of the principles of andragogy, it attempts to

elucidate differences between adults and children and ultimately to suggest how teaching adults should be different from teaching children (p. 234).

Figure 2.1 illustrates the model consisting of two classes of variables. First, Personal Characteristics represented as

... gradual growth of children into adults ... expressed as growth or developmental continua along three dimensions: physical, psychological and sociocultural (p. 235).

Second, Situational Characteristics

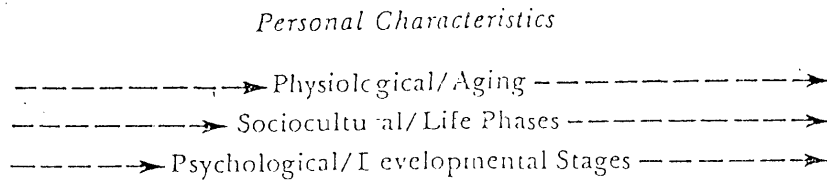
... usually expressed as dichotomies: part-time versus full-time learning and voluntary versus compulsory learning (p. 235).

This model calls for an adaptive and adjustive role for the educator in response to the various developmental and situational levels represented in any group of adult learners in a programme of study. The process of distinguishing between attributes of adults and children as learners implicitly correlates this knowledge with the potential for effective teaching, and implies also (particularly with regard to the CAL model) that any one group of learners can represent a variety of developmental phases in respect to the three dimensions. Development in the psychological and sociocultural dimensions is largely a function of the interaction between the individual and features of his/her environment that forms the basis of interaction psychology.

Cross's Chain of Response (COR) model is based on the assumption

...that participation in a learning activity, whether in organised classes or self-directed, is not a single act but the result of a chain of responses each based on an evaluation of the position of the individual in his or her environment (p. 125).

Figure 2.1: Characteristics of Adults as Learners (CAL)



*Situational Characteristics*

Part-Time Learning Versus Full-Time Learning  
Voluntary Learning Versus Compulsory Learning

Thus, Cross suggests that at any moment in the life of an individual, a variable (personal or environmental) can be assessed as a negative or positive force, given the quality of its link with the other responses.

The influence on Andragogy and other principles of adult learning by the work of both humanist and development psychologists is evident. Writing in the 1960s and 1970s, humanists Rogers, Maslow, and Jourard described the process of adult learning as a self-initiated process motivated by intrinsic reasons to know and thereby to grow. It was thus a process of self-actualization involving and pervading every aspect of the learner (Ibid, pp. 8-9). Houle (1961) saw these reasons in three broad and overlapping orientations to learning: the goal-oriented pursue education in episodes as need and/or interest arose; the activity-oriented participate in education for the love of participation, and the learning-oriented have a constant and inherent desire to know and learn (15-24). A study by Tough in 1968 led him to conclude that as well as his/her orientation to study, the adult learner underwent several phases in the process of engaging in a learning project. The importance of environmental features in helping the student gain competence in each phase might offer opportunities for improving his/her learning effectiveness (cited by Houle, p. 48).

Development psychologists, particularly those promoting theories of interaction, placed special emphasis on the role of the environment in shaping the growth of an individual and were thus more inclined than the humanists to take a more active role in deciding what kind of learning experiences were more likely to advance the individual throughout the various stages and phases of life (Cross, 1981: 229). Summarising the work of Miller (1967), Rubenson (1977), Boshier (1973) and Tough (1979), Cross pointed out common elements among them being: the conviction

"that (adult) participation can be understood through an analysis of the interaction between an individual and his or her environment" (p. 123): that adults are motivated to participate as a result of perceiving and balancing positive and negative forces in the situation; that the individual can determine his or her own destiny; that self-esteem influences participation; participation is personality related; there must be compatibility or congruence between attributes of the individual and features of the learning situation; and reward (intrinsic or extrinsic) is an important participation determinant.

## **2.5 Applying Principles of Adult Learning to Distance Education**

### **2.5.1 Adult learning and theories of distance education**

The influence, in varying degrees, of humanist principles of adult learning as a process of self-actualization based on self-initiated acts for largely intrinsic reasons, and also of developmentalist emphasis on the significant role of the environment in shaping the growth of the individual, on the development of distance education theory, is obvious in Keegan's classification of distance education theory into three distinct groupings. The first of these is grounded on principles of autonomy and independence and was developed in the late '60s/early '70s by such major contributors as Delling, Wedemeyer and Moore. The second category is based on a theory of industrialisation and was developed by Otto Peters in the early '70s. More recently, theories of interaction and communication were postulated by Holmberg, Baath, Sewart, Smith and Daniel.

Contributors to the first group believe that distance education is essentially about adult education, and principles of adult learning emphasising autonomy, independence and self-directed learning must apply. Institutional interaction with the students is not integral to the learning process. Rather, responsibility for learning rests largely on the student with the teaching institution offering guidance and support at the request of the student and to the degree that the assistance is requested. This assistance is gradually withdrawn as the student gains confidence and experience in the distance mode.

Theories of interaction and communication, however, emphasise student support as an integral part of the distance teaching/learning process. Models of distance education based on these theories range from Holmberg's 'guided didactic conversation' in which interaction and communication are achieved largely through artificial, non-text means, to Sewart's 'continuity of concern' which recommends as much inter-personal support as the student required. This support is based largely on the recognition of the variation in the learning needs influenced by personal, situational and environmental factors, that individual adult students bring to their learning tasks.

In Peters's industrialisation theory, the mass production process and the related objectivity of the learning materials are geared towards catering for a far-flung and widely-scattered student population making the possibility of personal communication highly questionable. Communication in the industrialised context is therefore largely by technical means within and without the learning materials which must form an integral part of the institution's student support system in a well planned, and paced teaching/learning structure. Because the industrialised model caters for mass education, it necessarily relies on the student's ability to study independently and to utilise mechanical and electronic means for interaction where required. This has implications for their predisposition to technology and artificial means of interaction.

### **2.5.2 Significant features of adult learners: independence and self-directedness**

Definitions provided by the literature of these two concepts indicate that there is considerable overlap in the way they have been seen and used. There is, however, a significant difference. With regard to the concept of independence, there is consensus among distance educators and researchers that this is represented by the degree to which the distance student is able to work individually from self-instructional learning materials and resources, within institutional conditions such as a course schedule and assignment submission deadlines (Keegan, 1990). Some authors have termed this a 'private' approach to study (Ibid, pp. 43-44), removing students from the group to more private and individual circumstances. Significant to the definition, however, is the degree to which there is dependence on a teacher to guide the learning process within institutional requirements. With regard to the concept of self-direction, the degree to which the teacher determines the learning content and process is the key element. The onus for what is learned and

how it is learned, and ideally, how long it takes to be learned, is on the student. Both concepts are about learner control, although an independent learner is in control of what is required of him/her by the institution which primarily involves the proper management of time and time commitments and the initiative to seek help when required, whereas a self-directed learner controls, to a large extent, the learning requirement. Bagnall (1987) sees the situation as one of dichotomy in the meaning of self-direction and suggests that what has often been taken to be self-direction in adults, is a situation of student self-management which relates specifically to the degree of control over the student by others. The capacity of the student to overcome constraints himself/herself, is the quality of self-determination. Neither skill, he suggests, must "be taken as a sufficient condition of a learner's preparedness to be self-directing" (p. 269).

Burge (1988), suggests that what has so far been accepted as self-direction in adults should, in reality, be seen as self-responsibility for learning (p. 269).

While there is general consensus among authors and researchers on the independence and self-directedness of adult learners relative to the learning of children and adolescents, the literature is beginning to challenge the universality of this claim and the accuracy of assumptions underlying it. Research into cognitive styles has indicated that adults will vary in their degree of self-directedness and independence. Some authors argue that these features are more a strategical approach to learning rather than characteristics of adulthood. Joughin (1991), while acknowledging that support for self-directed learning since Malcolm Knowles' 1970 theory of Andragogy has come from such prominent distance educators as Moore (1983, 1986), Holmberg (1989), Keegan (1990), and Garrison (1989), asserts however, "... that adult education has itself reached a turning point with respect to this concept" (p. 266), and now needs critical re-evaluation. He cites reasons given by several people, for example, Brookfield (1988) points out that most studies on self-directed learning used subjects from middle-class, educationally advantaged backgrounds, placing in doubt the generalisability of their conclusions (p. 267); in addition, these studies were almost always conducted in the context of western culture. Candy (1987) challenges the six assumptions commonly made in favour of increasing learner controls, ie. adults are individual learners, learner controls allow for different learner styles, increasing learner control increases motivation to learn, learner control contributes to the development of the whole person, learner control recognises equality of adult learners and educators, and learner control models represent a changed power

relationship (pp. 267-268). There is insufficient evidence, according to Candy, that these assumptions are accurate or resemble current practice in distance teaching/learning situations. He warns against the practice of 'pseudo autonomy' where teachers/institutions increase learner responsibilities in some areas while maintaining control over critical functions, especially assessment.

Similarly, Jarvis (1987), in support of Yonge's (1985) point that the difference between andragogy and pedagogy lies in the way the learner is accompanied through the learning process by the teacher, suggests that "the way that the learner defines the total teaching and learning process may affect the process significantly ..." (p. 10).

The learner arrives at this definition through the social processes in which he or she is involved. Thus if society expects children to reproduce knowledge, this expectation will be held by the child. Adults on the other hand might be expected to be problem solvers and this will affect the perception of learning of the adult.

In relation to this notion, Holec (1985) recognises that self-direction and autonomy are skills that can be developed, practised and improved in the process of 'learning to learn' (p. 184), is understandable with respect to the process of changing the expectations and perceptions of the learner. This objective is achieved along a continuum ranging from no responsibility for learning to full responsibility for autonomy. "For a learner to be able to undertake a self-directed learning programme of some kind therefore, it is not a necessary prerequisite for him to be already perfectly competent in these respects" (p. 179).

He adds that decisions about various aspects of the programme may be revised "as and when the learner wishes" (p. 179). Sharma (1985) sees this self-reliance as crucial to the liberation of the learner so that "once equipped with self-learning capabilities, learners will become their own best teachers and will not be dependent upon the provision of a school and a teacher to acquire knowledge" (p. 18).

Vaherva and Koro (1993) produced similar research findings. In evaluating the applicability of the self-directedness in distance education to open university study, they concluded that "as the

capacity to engage in self-directed learning was enhanced, so was the capacity of learning how to learn" (p. 372).

The instigation of a self-directed learning programme however, must take into consideration psychological barriers which potential students may have against autonomous methods, and sociological obstacles in the negative attitudes society may have against this mode of teaching as second best to having a teacher (Holec, 1985: 189). Holec stresses the importance of personality and self-esteem in helping students adhere to such a learning programme. He also indicates the importance of teachers knowing how much intervention is required at any specific point in the continuum, and the need for institutions to create appropriate conditions for both teachers and learners (p. 180). Joughin (1991) cautions against the ready acceptance of self-directed learning for adults and urges the need to approach any research into autonomy from the perspective of the learner if it is to be worthwhile (p. 270). An apt summary of his conclusions is contained in Candy's statement: "And in the final analysis, their willingness to accept increased control will depend on whether or not, in any particular case, they judge it to be a valid strategy" (Joughin, 1991: 268).

### **2.5.3 Situational and personal factors and educational experience**

The significance of the student's context and personal disposition in determining how much autonomy and self-direction is involved in any learning situation, is researched and discussed by Rekkedal (1988) and Benson et al. (1991). Rekkedal suggests that individuals who are well established in family, social and vocational life achieve more than younger students who are not married, living with their parents and often coming directly from other traditional schools and having only minor vocational experience (p. 219). In the Benson et al. study which set out to examine principles of distance education as represented by the Keegan categories cited earlier, and which involved 36 students enrolled in the first year Sociology units at Monash University, the authors found that research subjects did need a range of study support. They concluded that



... Peters' theory is more relevant to the inexperienced distance learner, that Holmberg's theory is relevant irrespective of distance education experience and that independence and autonomy, as promoted by Wedemeyer and Moore, become more increasingly important as distance education experience increases (p. 52).

Although the literature under review establishes the importance of environmental and personal factors with regard to successful distance teaching and learning, Gibson (1990) points out that major theories of distance education do not appear to consider the environment as a directly significant part of their models of the teaching/learning process (pp. 128-131). Its appearance is only recent, as an important element in Billing's (1989) model of distance education. Her own work in examining selected research on the basis of Kurt Lewin's (1936) behaviour model, that behaviour is a function of a person and his/her environment, has indicated that educational background, dispositional variables (attitudes and perceptions) and cognitive personality style and learning variables all appear to be good indicators of performance (122-123). The range of personal variables examined include demographic data, students' perception of academic ability, cognitive personality style, learning styles and motivation, field dependence/independence and personality. A significant variable in the student's life space is the educational environment and the extent to which it can and should be modified and enhanced by the quality and range of services to improve motivation and success rates.

Similar studies include that by Marland et al. (1990) who conclude from their research that, aside from poor textual material, students' personal situations, their academic backgrounds and approaches to study were key influences on how they responded to their respective courses. In addition, Yeheskel and Glicksohn (1993), Wagemans et al. (1991), and Eisenberg and Dowsett (1990) provided evidence of the significance of prior knowledge or academic background as indicators of achievement. In the last-mentioned study, the authors also found that people in occupations which require less qualified personnel had higher dropout rates, thus suggesting the influential role of colleagues in motivating persistence (p. 245). It is quite clear from the literature under survey that

...student withdrawal is related to a set of complex multivariables that act additively and interactively in numerous context-dependent ways to result in a dropout decision that is almost idiosyncratic in nature (Garland, 1993, p.388).

#### **2.5.4 Challenging universal applications**

The question of the universal application of the results of these studies is called to question by two considerations: discrepancies in the findings and application to students in different educational settings. In the case of the former, Gibson (1990) points out that discrepancies in some findings in the area of educational background may suggest that there are other intervening variables such as the self-other, self-environment congruence, dispositional barriers and locus of control as crucial to completion of courses, not accounted for in the body of research under review. Several authors indicate the significance of motivation and self-esteem in positively predisposing students to educational opportunities in the environment and thereby to more qualitative learning (Ostman et al., 1988; Harper and Kember, 1989; Taylor, 1989; Coldeway, 1991; Boondao and Rowley, 1991; Myers et al., 1993).

Gibson observes that research on environmental factors focussed mainly on modifying the educational environment in support of student persistence - tutor contact, telephone tutorials, peer tutoring, intervention practices, assignment turnaround times, pacing and the use of media (pp. 124-127). Again variations in student needs in relation to the use of the various services, practices and facilities indicated, suggest that "certain conditions govern these needs" such as context, content and delivery strategies, area and level of study, student orientation to learning, motivation and perceptions of existing barriers to learning. Powell, Conway and Ross (1990) define these conditions as predisposing characteristics which interact with characteristics of life changes and institutional variables to influence the probability of student success and persistence in distance education (see also Garland, 1993). In their study of 243 newly-enrolled students at Athabasca University, Powell et al. isolated nine major predisposing characteristics which differentiated between successful and unsuccessful students. Positive attitudes and high self-assessment towards success rated highly among these characteristics. On the other hand, known reasons for drop out can be classified under four general categories: demographic, social interaction, interpersonal or psychological and institutional. "... all four categories interact and should not be thought of as mutually exclusive" (Ostman et al., 1988: 22).

Powell, Conway and Ross make the cautionary point that changing institutional factors eg. pacing policy, group learning and additional support facilities may de-emphasize the importance of such predisposing characteristics and bring others to the fore. However, they also indicate that

on the other hand, it is also reasonable to suppose there are certain aspects intrinsic to distance teaching and the adult population who learn through such methods that may yield a set of 'generic' predisposing characteristics in distance education applying across institutions and student populations (p. 16).

Coldeway (1991), in replicating the Redeal Project, found that for some students at Athabasca University distance teaching is more effective when supplemented with classroom group instruction. The same kind of support was indicated earlier in the Benson et al. (1991) study, and suggests the need for institutions to monitor and modify any open enrolment and self-pacing policies to accommodate varying needs among its student intake "to encourage patterns of behaviour that are more likely to result in course completion" (Coldeway, 1991: 10).

There can be no question that efforts at synthesising research on the adult learner and adult learners at a distance within more natural settings are beginning to confirm the importance of the environment in influencing the adult students' motivation and disposition towards learning. Gibson (1990) recommends the continuation of such studies towards the establishment of a model encompassing the personal and situational circumstances of the adult distance learner, his/her educational environment extending beyond the institution to the broader context in which the learner exists, and the relationships which exist between and among these variables for a more appropriate, widely applicable and effective theoretical foundation on adults as distance learners.

## **2.6 From Concepts and Principles to Practice**

Transforming theoretical concepts and principles into a pedagogy of distance education taking into consideration the various implications that the 'distance' factor and relevant adult learning theory, principles and research must have for this pedagogy, has been one of the larger challenges of distance education. Henri and Kaye (1985), as quoted by Keegan (1991: 113), state that

the real challenge lies in the fact that in distance education one has to recreate at a distance the teaching-learning relationship; one has to put in place from a distance an educational environment in the student's normal living milieu ...

This "re-integration of the teaching act", based largely on artificial means, is brought about in distance systems in two ways: through the learning materials (both print and non-print) designed to achieve as many of the characteristics of interpersonal communication as possible; and secondly, by attempts at communication between teacher and students using direct and indirect means (Ibid, pp. 111-112).

In the process of recreating the teaching-learning relationship at a distance, the questions arise: what major considerations have formed the basis of distance teaching and learning, and what features and principles have contributed to its success or ineffectiveness? The many accounts by distance educators of their experiences and research either from theoretical perspectives or on the basis of reflective critical analysis of their involvement in distance education show that the distance education dilemma has largely been the choice between how much independence/autonomy, and how much and what kind of student support to offer.

### **2.6.1 Universally-accepted practices**

The suggestion by Powell et al. (1990) however, that certain aspects intrinsic to distance teaching and the adult population who learn through such methods may yield certain 'generic' predisposing features in distance education across institutions and across student populations, appears from the literature to hold some substance. The need for dialogue between teacher and student in both direct and indirect ways, for instance, appears to have universal acceptance. The debate on the role of local tutorials (Perraton, in Daniel and Marquis, 1988; Rekkedal, 1988; Holmberg, 1988; Thompson, 1990) is underpinned by the general recognition of the need by distance students for some face-to-face interaction. This need is based on a range of perceptions: that adults participate in learning activities for social purposes which are conducive to academic success (Houle, 1963; Garrison and Shale, 1990); Kirkup and von Prummer, 1990, and Ross and Powell, 1989, all note that women have a specific need to meet other students as a learning strategy; women also differ from men in other respects such as persistence and reasons for study (Ostman et al., 1988: 22-23);

race and ethnicity, in so far as they relate to socio-economic factors have been found to influence study persistence, (pp. 23-24); and there is also the special cultural need of students coming from strong oral traditions for group participation (Dunbar, 1991; Murphy, 1991; Leys, 1991).

Similarly, it is generally recognised that opportunities within the text exist for effective communication between teacher and student (Holmberg, 1988; Jevons, 1982; Gillard, 1981). Assignment feedback provides the opportunity for improving student performance (Cooper, 1992; Boondao and Rowley, 1991; Rekkedal, 1988). The use of technological support where possible is also becoming a significant 'generic' aspect of distance education. The ability of distance education and open learning to meet a wide range of educational goals previously constrained by time and place of offer, and by institutional admission regulations, has been demonstrated by the successful use of technology. Inevitably, these opportunities highlight the role of education as a liberating social force and make it available, on a more equitable basis, to a wide range of people in any given population. Various articles and studies have demonstrated the increasing demystification of technology as more and more projects are made possible by extensive and intensive use of media and technology. As a result, the use and merits of various forms of media have now become more focussed - between active and passive media, audio and visual possibilities and the potential of enhancing learning through the extended use of these media made possible by electronic means, through telecommunication and computer technology.

### **2.6.2 Practices generated by differences**

What is at issue in the literature, however, is the extent to which any one feature of distance education dominates and why. In this respect, it is becoming increasingly clear that the effectiveness of the distance education mode and programmes, and their allied support services, are dependent to a large extent on sensitivities to differences and variant needs, with regard to delivery and the wider social, cultural and economic contexts. Demographic differences within the student body (Hiola and Moss, 1990), cultural constraints (Leys, 1991; Dunbar, 1991; Murphy, 1991), social class differences (McIntosh et al., 1988), differences in student perceptions of study benefits (Morgan et al., 1982; Holmberg, 1977, in Ostman et al., 1988) and status differences between on-campus and distance students (Mahoney and Morgan, 1991) are instances which call

for measures of teacher/student interaction specified by the needs of the group of students in question. Leys (1991) questions the choice of the distance mode for students who have a strong cultural need for group involvement, and the cultural appropriateness of the content being taught to them (p. 299). She points out that the group of students in Central West Australia have a history of learner dependency for which adult learning theory of self-directedness has no relevance (p. 300). Both Dunbar (1991) and Murphy (1991) have similar findings for Indonesian and Turkish students respectively. Whereas the open education models adopted by both countries assume autonomous and independent learning behaviours based on western culture from which the models have been adopted, both cultures have heteronomous biases and strong oral traditions that place students in a position of disadvantage with respect to the expectations of independent systems of learning. Both sets of students are in transition from authoritarian, face-to-face systems where teachers represent authority and knowledge figures to be deferred to by students. In this respect "learning is a communal, passive activity" (Dunbar, p. 168) and students are technically unprepared for "coping with a teacher relationship mediated exclusively through text requiring advanced skills in making meaning of tracts of literature" (p. 170).

In addition, Turkish students exist within a system of patronage where reciprocal links of service and protection are established between individuals of unequal status (Murphy, 1991: 43). Hiola and Moss (1990) point out that because the characteristics of students at Universitas Terbuka, Indonesia, including their study aspirations, differ in many ways from norms established by research into equivalent institutions in the developed world, this has implications for the kind of services offered to them.

In terms of our teaching at the OU, particularly regarding tuition and counselling, an awareness of the diversity of students' aims and purposes especially in relation to self-confidence and personal awareness, can make us more sensitive to learning from the students' perspectives and thus help them to achieve their goals (Morgan et al., 1982: 19).

One area in which distance students can differ is with regard to their study purposes. Holmberg (1977) argues that

some students, whom he calls 'self-actualizing', may not need to officially complete a course of study to achieve their personal goals. That is, they may have learned what they set out to learn (in Ostman et al., 1988: 8).

Similarly, Bligh (1977) points out that many students did not intend initially to complete a programme or course. Other students may drop out temporarily in order to continue later (p. 8).

Developing countries do not have the infrastructural, economic and sometimes political support to promote the extensive use and know-how of technology. Student populations in developing countries are less familiar with and have less access to technological opportunities than their counterparts in metropolitan countries.

When we write teaching material and organise tuition, we make assumptions about our student audience; their literacy, ethnicity, gender, educational attainment, motivation to study, study skills, need for information, and a host of other matters." (Forward by Evan I. Jones, Acting Principal NZTCI in Ostman et al., 1988: vii).

Properly informed assumptions are a necessary ingredient for the formula for effective distance education proposed by Daniel and Marquis (1988) of 'getting the mixture right', which "can only be conceived in relation to the country and context in which it is set" (p. 355).

Sharma (1989) endorses this view in his suggestion that distance education has the capacity to accommodate differences by

placing the learner at the center of the curriculum development process. By focussing on the actual learning environments and specific needs of disadvantaged groups and by making the best use of today's technologies, we can make the necessary quantum leaps in education (p. 21).

Interventionist models of support (Brindley and Jean-Louis, 1990; Rekkedal, 1988), and special support programmes such as the SITE bridging programme produced by the University of New England, Northern Rivers, to assist students in developing effective learning skills and make the most of resources available (Kinney, 1991), are exercises based on the recognition of variations in student needs with regard to learning orientations and skills, and the need for enhancing motivation and self-confidence in the course of pursuing distance studies. Brindley and Jean-Louis justify recommending the compulsory involvement of students in pre-admission and pre-registration services on the ground that

although adult learners should be able to maintain their independence, it is wrong to assume they have the information they need to make sound decisions about their education or that they have the skills and background knowledge needed to meet their educational goals (p. 68).

## **2.7 Distance Education and Adult Learning at USP**

When the teaching staff of the USP began offering their courses in a dual mode in 1971, the attitude that prevailed then was that these distance courses were substitutes for live teaching but could not replace it completely. In addition, it was felt that some courses, by virtue of the nature of their subject matter, or level and type of mental skills required to cope with them, could not be taught in the extension mode. Much has happened since this time to help change this stance to one where course materials must be as self-contained as possible so that "... a student working on his own in a remote location has a fair chance of success" (J. Chick, 1979, as quoted in Renwick et al., 1991, p. 16). This was not to preclude the offer of additional study support where it was accessible to students.

Although this philosophy places the distance education emphasis on the provision of equity and facilitation of opportunity mainly across the physical dimension, it is not difficult to envisage that its implementation could "encourage teachers to see that what really matters is facilitation of learning, not dogmatic instruction" (Sharma, 1989: 23); furthermore, that "distance education informs learners that learning depends on themselves, on their own motivation to learn, on their commitment to learn the lessons on their own, with guidance and support from tutors and learning materials" (p. 23).

### **2.7.1 The student perspective**

The current development philosophy for extension studies,

that a student studying through the distance mode shall normally be provided with teaching/learning packages which, in themselves, have been designed to enable him/her to succeed in the mastery and passing of the course. These packages shall, to the fullest extent, comprise instructional strategies and media appropriate to the known student market and the general 'standalone' policy.



continues to recognise the significance of the student in guiding the distance teaching process in particular. However, in spite of the existence of such a philosophy, both the COL Report and the CFTC Report saw the need to recommend putting in place plans, policy, objectives, teaching systems, methods and support facilities that would reflect an appreciation for the extension students and the circumstances in which they operate, and are taught (see Extension Services: Its Future Directions and Place in the University of the South Pacific, unpublished and undated University Extension report).

Wallace (1990) pointed out that "... to date, very little assembled information on a profile of the South Pacific student is available" (p. 13).

Research work of a regional nature bearing directly on the distance learner include an unpublished MA thesis (Tuimaleali'ifano, 1989), a 'Student Evaluation of USP Extension Studies Courses: Report of an Analysis of Course Evaluation Forms' by the Distance Education Unit of University Extension, 1991, and recently published research by USP staff on 'South Pacific Women in Distance Education' (1995). Apart from essential demographic data, USP also needs "... to consider how such psychological factors as motivation, cognitive styles, and socio/cultural nuances (e.g. independence versus co-operation) enter into and affect learning processes and outcomes" apart from the "... importance of understanding the learners' background, intellectual capability, attitudinal disposition, etc. in order that most meaningfully and pedagogically sound learning experiences are presented" (Wallace, 1990: 13).

Antecedent skills (English language levels, numeracy levels and prerequisite content knowledge) are also part of the broad prerequisite knowledge of the adult USP learner that is necessary for the planning and development of effective and relevant course packages.

### **2.7.2 Accommodating the students: Institutional initiatives**

Since very little is known from research about the USP extension student market, much of the work of University Extension can therefore be said to be based on assumptions about it and the collective, but limited experiences of the instructional design staff in particular, of the students

for whom they collaborate with teaching staff to develop teaching/learning situations. The situation continues to be perpetuated in new developments. For instance, the newly created blueprint for the design and development of distance education courses,

... does not presuppose the use of any particular teaching approach, rather, consistent with sound instructional design principles, it provides a systematic approach for determining what combination of strategies are most likely to bring about the optimum teaching-learning experience for particular students in particular situations (University Extension Handbook, 1994: 1).

Furthermore, one function of the blueprint is to provide the Instructional Strategies Committee with "a formal means for determining if the proposed teaching methodologies and academic content are appropriate to achieve the objectives of the course" (p. 2).

If these objectives include learning by its target group, then there is a need to know who is learning and in what context this learning is taking place if indeed it can be ensured that for the student "... a well designed product is received" (p. 3). The blueprint document also recommends a productive study workload of 6-10 hours each week (par 2.4), presumably, in the absence of appropriate empirical evidence for the JSP extension student, an estimation derived from years of experience in distance education in this context.

Another development deemed a success from the operational viewpoint alone is the newly-introduced 30-week teaching semester. This study schedule was introduced in 1993 "so that there is quantifiable, quantitative improvement in the student support services, content and management of the distance education programmes". as well as to allow "sufficient time for the assignments to be marked and returned to students well before the final examinations, and for students to accommodate study, family and work schedules" (University Extension Handbook, 1994, p. 63). Overwhelming and continued support for this initiative is reported in both the 1992 and 1993 University Extension Annual Report; from the planning, preparation and administrative perspective, on the basis of which additional courses are being offered over a 30-week study period. Yet initial evaluative comments about it in the 1993 University Extension Annual Report were all negative, and some Centres also sounded warnings of negative reception by students, in the same report. Completion and pass rates dropped for some Centres. Results in 1993 for the Fiji Centre which enrolls about 50 percent of the total extension intake per semester are as follows:

**Table 2.1: Examination results for the Fiji Centre, 1993**

Semester	%Pass	Number	%Fail	Number	%EX <sup>3</sup>	Number
1	58%	1475	19%	475	23%	593
30-week	46.2%	384	23%	190	31%	257

(From: University Extension Annual Report, 1993, pp. 68, 70).

It is obvious that these new developments are intended as effective measures to ensure appropriate delivery but they would benefit from the holistic perspective if the corresponding student dimension were also a designed rather than an assumed part of the total package.

Not only are research and data on the adult distance learner required as the basis for sound educational philosophy, policy and objectives, generating this, and related information should also be an on-going process so that as "distance education grows it must ensure that its programmes, methods and media are based on research and the educational needs of the masses with particular reference to time, place and environment" (Qazi, 1989: 158).

This continuity is an important objective of the Course Evaluation Questionnaire which accompanies each course sent out to extension students to elicit important evaluative information not only on the course(s) in question, but also about the student in relation to his/her performance in the course(s). However, aside from the relatively comprehensive data collation exercise conducted in 1990 and published in 1991, the use of this information over the years has been on a piece-meal and sporadic basis by instructional designers and course writers seeking information on particular courses. For distance education at the USP, this raises an important question: if the student dimension is significant, who is responsible for the provision of this, and other information pertinent to the student's situation, with the regularity required for it to be useful?

Dual-mode institutions such as the USI run the risk of continuing teaching traditions applicable to young, full-time students for adults in a distance teaching mode. Coldeway (1982) indicates that "almost everyone has grown up in a pedagogical system and overcoming this long term indoctrination into pedagogy would require much attention" (p. 91).

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<sup>3</sup> This grade is awarded to students who fail to sit for their final examination.

It was partly this potential risk that prompted the dual-mode system of teaching which has now become a contractual obligation for teaching staff - "to involve teachers in the wider region, to help them become familiar with its diverse needs and adapt their teaching accordingly" (Renwick et al., 1991: 11).

This, and other initiatives to accommodate diverse learning situations in the Region, are discussed and reviewed by Tuimaleali'ifano (1993). The establishment of the Course Development Unit (now Distance Education Unit) in 1982, was a significant step forward for the student dimension. In support of the important role of the Distance Education Unit (DEU), the COL Report states that

Extension Services carries in the minds of its Course Developers (now Instructional Designers) an institutional memory of the requirements of distance education for the Region that the university would almost certainly not otherwise have (p 54).

In view of the University's high percentage of overseas staff and the high staff turnover caused in part by the contract system of staff hire, as well as the insufficient obligation for succeeding members of staff to pick up where predecessors have left off, this function is crucial. Foreign staff bring with them teaching experiences which

could be in danger of ignoring the cultural and social contexts in which course development, teaching and learning take place (Eldington, 1989: 17).

However, the pressing need over the years for University Extension to develop new courses and to upgrade existing ones has left little time for appropriate research by staff of the DEU. A recent staffing restructure and redesignation exercise appears to have overlooked this academic dimension of the work of the instructional designer to a large extent, stressing instead the management and leadership role of the Co-ordinator of Instructional Design and Development (CIDD), and the instructional design work of the Instructional Designers (IDs) focussing around a

demonstrated working knowledge of current advances in the field of instructional design for distance education pedagogy (Unpublished and undated University Extension Document on Redesignation of Post Titles).

As such advances are usually the result of empirical and theoretical research in developed countries, the question of relevance and applicability for the USP is raised, in the absence of opportunities for local research to establish the extent to which such advances are useful for a specific USP distance and adult learner pedagogy. When one considers also the mature age access policy of the USP (see Tuimaleali'ifano, 1993: 290-291), it does not need a great stretch of the imagination to envisage the kind of heterogeneity that must exist among these students that will render all sorts of implications for the way extension courses are taught and distance learning is supported at USP. Research work, as a priority task of the DEU, may be implicitly embedded in the total job description of the CIDD and IDs, but the failure to be explicit in this regard may also reflect a trend towards treating instructional design work from a largely teaching and institutional perspective at the expense of a more holistic educational one. The staffing restructure exercise mentioned above appeared to have given significant consideration to the results of a questionnaire feedback from IDs, obtained by a secondee to University Extension from the University of Southern Queensland, which indicated that many of the current ID staff did not have any formal training in the area of instructional design or experience in educational theory (transcript of Oral Presentation by R. Wah and Noel Thomas at the University of Southern Queensland, 15 June 1993, on the Restructuring of University Extension and the Distance Education Unit : 7). The danger in this approach is the possibility that the restructured situation may well have been created to suit the personnel currently in place rather than on the basis of need related to the educational objectives of the DEU.

In essence, the network of eleven study support Centres, twelve sub-centres and forty remote community liaisons for national Centres; (University Extension Annual Report, 1993: 1), spread over all but one of the countries of the USP Region, serves the purpose of monitoring "local differences in the local environment that would be best catered for at a local level" (Tuimaleali'ifano, 1993: 292).

However, Tuimaleali'ifano also points out that

economically, politically and socially, and with respect to levels and rates of, and priorities in national development, some countries are better suited and able to offer a wide range of student support facilities and opportunities than others (p. 292).

This has resulted in a situation of "unequal treatment of students by the system of Centres across the Region, (and) has created differentials in the opportunities for successful performance amongst USP extension students" (p. 293).

In light of the recommendations for improving teaching-learning opportunities by the COL and CFTC reports mentioned earlier, it would appear that the recommended USP distance education policy and philosophy need to take this factor into consideration in order to bring opportunities of equity and facility of their operation at the local student support level.

One further problem for the USP distance education student is contained in a memorandum from the Centre Director of the Cook Islands to the Co-ordinator of Course Development, in November 1984. He stated,

It should also be noted that studying via correspondence, that is on one's own, is a relatively new and often frightening experience for many of our students. This is said not as a justification for this high rate of failure to complete courses but rather as an explanation of the situation-reality of many students. And for many of them, the adjustment from a collective (group or class) to an independent learning situation, which is required of university study, it is a transitional period of great difficulty (Herrmann, 1984).

Although over 10 years have lapsed since this statement was made, for the ever-increasing number of new extension students each semester across the Region, the same anxieties and related difficulties can be expected.

## **2.8 Conclusion**

Although the role of University Extension has changed from a largely administrative one in the 1970s, to one which now contains the DEU responsible for instructional design and related student support, there is still a predominant preoccupation with teaching and institutional matters. It is interesting to note that after more than twenty years of distance education, the University Extension's response to the COL and CFTC reviews was to address primarily "a number of policy, organisational, and operational matters ... before significant progress can be made" (Extension Services: Its Future Directions and Place in the University of the South Pacific: par. 3).

The recommendations related to issues raised in the two reports were summarised into six categories. Of the six, the last recommendation was the only one directly pertinent to the student with its reference to the improvement of teaching/learning opportunities. In spite of the fact that this dimension got considerably more recommendations for attention by both reports than any other area, it was left out in the pursuit of "the best outcome for the institution" (ibid, pars. 2 and 3). These infrastructural and institutional policy changes have been endorsed by the University's Council for immediate implementation (University Extension Annual Report, 1992: 1).

These changes affect - or should affect - dramatically the institutional management of the Extension Studies programme, the internal structure of University Extension (newly named) and the future redevelopment of the University's regional communications system. ... The end result of the infrastructural changes should be a management system which is comprehensive, clear and large enough to meet the needs of a Distance Education programme which has grown substantially since its inception twenty years ago and which has potential for future expansion.

## **2.9. Chapter summary**

In this chapter, literature on the establishment of the USP and its distance education programme was examined. It has been seen that the challenges facing the University were largely generated by the diversity of the Region and the resulting pressures on the University to continuously respond to the variations in training and educational needs across the Region. In so doing, it has tended to focus more on institutional matters than on the learning needs of its distance students who are mainly adults. An examination of the literature on adult learning theory and principles clearly indicated the many factors that have to be taken into consideration in order for adult learners to be properly accommodated by the institution. This examination also included a discussion of the relevance of principles of adult learning and features of adult learners identified by the literature across different educational settings and locations, with a special focus on USP. The relative neglect of the student dimension at USP, and the need to redress this formed the concluding comments of the chapter.

## **CHAPTER 3 : STUDY DESIGN AND METHODOLOGY**

### **3.1 Chapter Outline**

This chapter describes the research procedure followed in this study, including its major components (study population and selected distance education programmes), design, data collection and analyses. References to the literature with regard to survey research and the interview process are made where appropriate and also in association with the discussion of questionnaire design and pre-testing. A brief data analysis plan, including statistical procedures used in questionnaire data analyses and the presentation of interview information, concludes the chapter.

### **3.2 Introduction : The Design of the Study**

This study is essentially a survey seeking answers to research questions derived from principles of adult learning, and the influence of personal, situational and study environments on adult distance learners at the USP. To this end, two groups of data were obtained and analysed. The first group of data was elicited through a questionnaire and subjected to various statistical procedures. The second group was collected via the interview of a selected number of students in as many of the nations of the USI' Region as permitted by the logistics, time and funds pertinent to the study. This data was intended to contribute a qualitative dimension to the study that complemented the statistical findings of the first group of data. The purposive selection of interviewees also provided an opportunity to address any imbalances that might occur in the questionnaire data such as regional, gender and ethnic representation. As well as a composite study and general discussion of the interview data, five interviews were selected and presented as case studies highlighting, in qualitative terms, some of the major statistical findings of the first part of the study. Again an important criterion for the selection of case studies was to ensure that as many variations as possible across the population dimension were represented.



### **3.3 Major Components of the Study**

#### **3.3.1 The selected extension studies programmes**

This study set out to survey all students enrolled in the core courses of the Diploma in Accounting Studies (DACS), and the Diploma in Management Studies (DMS) in Semester 1 (February - June), and in the 30-week schedule (March - November), 1993. The 30-week schedule (see Chapter 2) is part of the on-going initiatives by University Extension to improve current study and support conditions for its students.

The selection of these two programmes was based primarily on their increasing popularity among regional students since their introduction and development during the 1980s. In this period the USP vocational programme structure was redesigned to cater for the increasing number of students who were aspiring towards further and complete study by extension (Renwick et al., pp. 23-24). The restructure essentially provided students with the opportunity to go on to Diploma studies from preparatory Certificate programmes. Thus both the DACS and the DMS build on Certificate programmes designed to "help students acquire basic skills and techniques" (Extension Students Handbook, 1992) that ensured that students moving towards higher level qualifications had undertaken preparatory and prerequisite courses which enabled them to do so. The preparation was provided for by way of lower level, background courses at the Foundation, Vocational and/or 100 level degree courses which could also be prerequisite study for select Diploma courses. In the case of the DACS, six out of the eight core courses of the programme are offered in the Certificate programme, two of which are prerequisites for the 200 level Accounting courses in the Diploma. For the DMS, two core courses are offered at the Certificate level which are also prerequisites for some of the 200 level Management courses in the Diploma. Both Diplomas consist of ten degree level courses, with core courses at the 100 and 200 levels, and optional enrolment in 300 level courses. Programme course components and details for each Diploma are provided in Appendix 2.

Table 3.1 below gives an indication of the steady growth since 1988 of enrolment numbers in core courses constituting the two programmes since 1988. In more recent years of the programme, quotas had to be placed on enrolments so that the departments concerned were able to cope with

their offer. MG201 and MG205 were new additions to the extension provisions towards the DMS. Other gaps in the data (following offers in previous semesters) indicate the fact that the courses were not offered in those years.

In the first semester of 1993, the time of survey, the Accounting courses AF102 and AF201 were offered towards the DACS, with the two 100-level Economics courses, EC101 and EC102, as well as MA101 Basic Mathematics, and SE100 Social Survey Methods and Data Analysis, which were offered on 30-week schedules. For the DMS, two 100-level courses, MG101 and MG102 were offered on the 30-week schedule, as well as MG207 on a semester basis. Enrolments in these courses constituted the population from which students in this survey were drawn.

**Table 3.1: Number of enrolments in core courses for the DACS AND DMS, 1988 TO 1994**

Course Code	No. of enrolments for period '88-'94					1993	1994	Tot for Period	% of tot for per.*
	1988	1989	1990	1991	1992				
AF101	255	318	324	289	369	308	314	2177	12.1
AF102	138	185	254	254	267	267	316	1681	9.4
AF201	90	132	128	112	68	97	149	776	4.3
AF203	76	121	114	121	125	161	109	827	4.6
EC101	113	198	180	224	160	175	-	1050	5.9
EC102	133	247	119	159	167	114	-	939	5.2
MA101	88	117	127	156	-	141	-	629	3.5
MG101	255	222	380	337	317	199	410	2120	11.8
MG102		173	268	234	255	200	232	1362	7.6
MG201							121	121	**
MG205							10	10	**
MG206	40	77	55	73	65	90	58	458	2.6
MG207	74	52	65	69	82	69	106	517	2.9
SE100	205	180	274	272	264	163	-	1358	7.6
TOT	1467	2022	2288	2300	2134	1984	1825	14025	78.0

\* This column represents the total enrolment in the core courses for the DACS and DMS as a percentage of the total enrolment in extension degree courses for the period. The average number of degree courses offered per semester over this period was 38.

\*\* Not calculated because courses began much later.

(Source: USP Student Database)

### 3.3.2 Features of the Diplomas conducive to this study

Several features of the two diploma programmes made them particularly conducive to the aims and objectives of this study and to finding out answers to the study questions. These are discussed as follows:

- (i) Target population: Both the DACS and the DMS are vocational programmes aimed at "people already employed in areas of governmental, commercial and community activity" (University Extension Handbook, 1994: 9). It can therefore be expected that their target population will be adults in some form of employment for which some educational and experiential qualification were required. There is a strong possibility therefore, that a range of employment situations requiring different skills and levels of education, in both the public and private sectors, will be represented. These features are important to key issues of adult learning principles, requirements and strategies under investigation in this study, namely the significance of prior education and work experience to the learning disposition and orientation of adults (see Chapters 1 and 2).
- (ii) Enrolment Numbers: The popularity of the two programmes among countries of the USP Region ensured the possibility that sufficient numbers of students would respond to the questionnaire in any given period of time, so that not only would the study sample be large enough to provide statistically viable results, it could also be expected to be as representative of the study population as possible. This was a feature of great importance to the study as, at the time of data collection, the researcher was informed that the student database software programme was still in the process of installation and trial and information beyond student names, registration numbers, postal addresses and examination results was unable to be generated in print format. This information was therefore unavailable to the researcher, who, for reasons of confidentiality, was not permitted to have direct access to the database. Because information regarding the study population such as demographic characteristics, educational background and exact location (for those who provided postal box addresses), was inaccessible, a comment could not be made about the representative nature of the sample who returned responses with respect to these features of the study population.

The large enrolment in the two vocational programmes selected was also likely to ensure representation of students across the USP Region. Both this, and the possibility of a sufficiently large and statistically viable response rate widened the potential of this study to provide general conclusions about vocational distance education students as a regional body as well as comments about features peculiar to students and studying in individual countries represented by students in the study sample. Personal and environmental factors under investigation are derived from the diversity represented by this cross-section of students which forms the basis of the key questions of this study.

### 3.3.3 The students

Altogether 1,369 enrolments were recorded for these nine courses in the period under study. These enrolments included students enrolled in more than one of the courses so that the total number of students enrolled came to 1,213 in all. The following table presents the distribution of these enrolments across the research courses and across USP Centres.

**Table 3.2: Semester 1, 1993, and 30-week Enrolments in DACS and DMS Courses Across Centres**

Centre	Courses									TOT
	AF102	AF201	EC101	EC102	MA 01	MG101	MG102	MG207	SE100	
Fiji	225	90	99	83	111	153	134	47	126	1068
Ck. Is	4	2	2	-	2	11	11	2	7	41
Kirib.	5	-	2	1	2	1	8	1	7	27
Nauru	-	-	-	-	1	2	1	-	-	4
Niue	-	-	-	-	-	3	1	-	-	4
Sol. Is	3	3	1	1	1	3	11	5	2	30
Tonga	9	10	11	10	17	14	11	6	9	97
Tuvalu	-	-	2	1	-	3	-	-	3	9
Vanuatu	11	-	5	5	4	7	3	4	-	39
W.S/Tok	7	1	1	-	4	10	9	3	15	50
Total	264	106	123	101	142	207	189	68	169	1369

### **3.3.4 Characteristics of the students**

Features of the expected student intake into the DACS and the DMS as significant to this study have been discussed in the preceding section on courses. In addition, the University also has a mature entry policy which allows persons of 21 years and over admission into degree level courses. It is expected, therefore, that a number of students in the study population would have gained admission by virtue of the mature age policy. Implications related to this means of admission which are important to this study are the admission of adult learners and also the possibility that at least some of these learners would not have had adequate high school qualifications in terms of level or subject area or both. These may well be variables associated with appropriate preparation for and disposition to study by distance.

### **3.4 Data Collection**

The design, scope and specific features of this research project such as the geographic spread of the USP Region and its distance students, lent themselves to the mail questionnaire as the primary means of data collection, from the outset. The choice of survey as research design was largely the outcome of the goals and objectives of the study to establish and evaluate attitudes to learning and academic achievement among USP distance education students, and to identify relationships among personal, situational and environmental variables, and academic performance and learning persistence. Oppenheim suggests that the research design and method selected "all depends on what we need to find out, on the type of question to which we seek an answer" (1966, p. 8). Two other reasons for the choice of the survey design were the large number of subjects involved (Oppenheim, 1966; McNeill, 1990; Borden and Abbott, 1991), and the scattered nature of the study population. As presented previously, altogether 1,213 students formed the study population spread over 11 member countries of the USP Region. It would be almost logistically inconceivable, given the limited timeframe and budget of a full-time PhD programme, to endeavour to collect data from such a population through any other method than the mail questionnaire, typically associated with surveys of this scope and nature.

A fourth and equally significant reason for the choice of survey questionnaire in this study was the large amount of data that needed collecting. The heterogeneous nature of the Region and its people and the related diversities expected with regard to personal, situational and study environments, in addition to the exploratory nature of this study, meant that a large number of variables and factors must be investigated in order to encompass and accommodate the purposes and questions of the study.

### **3.4.1 The questionnaire**

A questionnaire was prepared and tested as the main instrument of data collection. The questionnaire covered five general categories of questions, viz: Section 1: personal and demographic data; section 2: cultural and social context; section 3: economic context; section 4: educational background and current involvement; and section 5: study environment and support. Each of these sections represented major components of the personal, situational and study environments of the research population and the survey questions sought to elicit responses pertaining to variables within each component that were deemed influential upon the students' disposition and preparedness to study as adult distance students as well as their persistence and performance. These envisaged relationships are summarised in the Conceptual Framework of the Study in Chapter 1.

### **3.4.2 Designing the questionnaire**

Both open and closed question types were included. The former were especially required where the range and quality of responses concerned were unknown to the researcher at the time of designing the questionnaire. Predetermined choices could therefore not be devised without increasing the risk of excluding possible or accurate responses for the respondents. This situation might also have forced respondents into the position of 'underreporting', ie. being forced to choose from a limited number of alternatives (Bradburn and Sudman, 1981: 14; also Warwick and Lininger, 1975: 134). Another reason for the use of open-ended questions in this study was the opportunity they provided for the "free, spontaneous sketch in the respondent's own language and

containing his own ideas" (Oppenheim, 1966: 43) about select study variables. This was deemed particularly valuable for the variety and detail of interpretation it afforded when compared to related responses given in the closed format in other sections of the questionnaire.

Advice on the effective development of the various aspects and component parts of the questionnaire - significantly the introductory and cover letter, questionnaire presentation and layout and question writing and instructions, - guided the preparation and development of the study questionnaire as much as possible (Foddy, 1993; McNeill, 1990; Sudman and Bradburn, 1983; Belson, 1982; Bradburn and Sudman, 1981; Warwick and Lininger, 1975; Kerlinger, 1973; Oppenheim, 1966;). In the case of question writing, each question took note of Belson's (1982: 23-27) 14 characteristics of questions containing difficulties, in particular those that had been found to occur most frequently such as presenting two questions as one, including a lot of loaded words, concluding with a qualifying clause or phrase, containing multiple ideas or subjects, containing difficult or unfamiliar words and/or phrases, containing more than one instruction to the informant, having a negative element in them and inverted sentences. Also, very long questions and grammatical issues such as the mix of present and past tense and the mix of singular and plural were avoided as much as possible. Instructions, particularly those pertaining to multiple choice items were kept consistent throughout the questionnaire.

Careful attention was also accorded the covering letter and its potential not only to introduce the questionnaire and its purpose but to persuade the respondent of its value and thereby encourage a response. Also significant was the opportunity provided by the covering letter to encourage a positive attitude within the respondent towards the questionnaire and its purpose. This was attempted especially by an explanation of the survey, its sponsorship and importance in relation to the student. The questionnaire, complete with introductory letter and cover page, is provided as Appendix 3.

### **3.4.3 Testing the questionnaire**

The testing of the questionnaire took place among students enrolled at a distance through the Fiji Centre in Semester 1, 1993. The trial took special cognisance of the reliability and validity of the

questionnaire items: whether the questions would return consistent responses and whether the questions would be consistently interpreted by all respondents so that the information returned would be truly representative of reality (McNeill, 1990; Oppenheim, 1966).

Thirty questionnaires with instructions for administration were sent to the Fiji Centre for distribution to students enrolled at a distance in Fiji. These instructions were essentially intended to ensure that the conditions of the trial replicated as much as possible what was known and/or assumed about circumstances of the study population and situation, such as level of enrolment, student location, socio-economic differences, ethnicity and educational background. Staff at the Fiji Centre ensured that these conditions were met to the best of their ability. This was evident in the responses received and features of the students who returned questionnaires.

Of the 30 questionnaires distributed, 13 students (43%) returned responses. This was a satisfactory return rate which indicated the adequacy of the level of persuasion of the covering letter. These students were located in main urban centres such as Suva, Lautoka and Labasa, as well as in small rural towns and peripheral locations on the edge of the catchment areas of main urban centres. Although no one from an outer island returned a questionnaire, the isolation and distance factors of location were adequately represented by students in towns without a study centre such as Rakiraki and Ba, and by those in peripheral locations.

A profile of these students revealed a satisfactory representation of demographic and other personal features significant to the study. There were seven women and six men ranging in age from 19 to 46 years; five students were single and eight were married, living in both nuclear and extended family situations of between two and eight people; there were seven Fiji Indians, four Fijians, one Polynesian and one of mixed ethnicity; in the area of employment, civil servants dominated, followed by middle management and office support staff, with two students being unemployed.

With regard to the returned questionnaires, in general respondents appeared not to have had any major difficulties with interpreting and answering the questions consistently, which vouched for the reliability and validity factors. There were four major categories of difficulty; these are given below with a description of the step taken to redress the problem concerned.



### Problems related to insufficient or unclear instructions:

1. The aggregate response to the questionnaire revealed that all students seemed to have had a problem with the instructions on how to indicate their answers to multiple choice questions which made up the bulk of the questionnaire. Students were instructed to indicate "the letter(s) of your choice in the space provided in the righthand margin". Consequently, underlined stress was placed on the key words (letter(s); righthand margin) in the relevant instruction.
2. In the question on community responsibilities, a sentence was included to advise students that job-related activities such as union involvement were also considered in this category.
3. The sub-centre was included as an option where references were made to the study centre, as sub-centres substituted for a full Centre for students particularly in smaller urban contexts, other/outer islands or peripheral rural areas.

### Redundant instructions

These were revealed in some of the questions both from a semantic and structural point of view.

1. An example of the former was the question "How many people live in your household including your children?". The underlined section was subsequently removed.
2. Other questions had structural redundancies such as "some of the above" and "all of the above". These two options were replaced by instructing the students to indicate more than one option if they wished, in order of priority. The priority rating would help to identify and evaluate the importance of the individual options in response analyses later on.

### Excluded questions

Comments by the respondents stimulated the creation of two very important questions which were left out of the trial questionnaire.

1. One of these related to the course(s) that the students were studying, and final examination grades, if they were available. Where examination results were not available at the time of survey, a section was included for students to give the researcher signed permission to obtain the results from the USP at the appropriate time.
2. The second omitted question was concerned with the amount of study time that the student was able to allocate himself/herself on a daily basis. This question would provide the basis for assessing the extent to which other commitments and/or time-consuming involvements competed with time for study in the lives of the USP students.

#### Loose structure

One question in particular (Q. 45), was not relevant to all students and an instruction was added to this effect to prevent these students from answering unnecessarily.

The trial questionnaire included an evaluatory section at the end, inviting student comment and criticism. Most of the respondents did not find any major fault with the questionnaire as it was and comments were largely related to extended explanations of responses to some of the questions which were not required for the survey. The average time of completion of the questionnaire was about an hour and a half, which seemed to be a reasonable expectation and no need was felt, therefore, to reduce the number of questions.

#### **3.4.4 Questionnaire distribution**

Because of the dispersed nature of the member countries of the USP, distribution of the 1,213 questionnaires to students began with the help of a research assistant based in Suva and continued by the researcher on her arrival in Suva for a three-month field period. The use of University Extension's mailbag delivery system to the USP Centres in countries of the Region was an integral part of the process and enabled the speedy distribution of the questionnaires. Within the countries of the Region, the assistance of the Centre Director and/or staff was sought in getting the questionnaires out to students by post or hand delivery to those who visited the Centres. Each delivery by mail consisted of a questionnaire, cover letter and stamped return envelope. After two

months, a reminder letter (Appendix 4) was sent out to those from whom there was no response. Those for whom a telephone number was available were reminded and requested to return their completed questionnaires by phone. Through these processes, just over 300 questionnaires were returned although more than 20 of these could not be used because they contained insufficient responses. Responses from 278 students provided the data for this study and represented a 23 percent response rate. Although low as a percentage of the total study population, the number was large enough in itself to produce statistically viable results that were generalisable to students in the study population.

### **3.4.5 Student interviews**

Data was also elicited through the interview of a selection of students in the study population. Interview data was sought for the many benefits associated with it. Aside from the fact of its adaptability and flexibility for all kinds of respondents and situations, the interview also offers opportunities to keep the co-operation and motivation of the respondents high, to probe responses further to the satisfaction of the interviewer, and especially to enter into and pursue spontaneous situations that can lead to useful additional and relevant data (Douglas, 1985; Warwick and Lininger, 1975; Kerlinger, 1973; Oppenheim, 1966). Warwick and Lininger (1975) also advise "a methodological mixture which will capitalise on the strengths of each approach" (p. 12), which was the main reason for the survey/interview combination of this study. While the questionnaire survey allowed data to be gathered on the scale that this research project required, many of the weaknesses and gaps associated with quantitative assessments could be redressed and complemented by the interview process and results. In particular, given the limitations of the questionnaire data collection of this study discussed in this chapter and associated with the nature of the USP region, the widely-dispersed student body, and the fairly heavy dependence on external support for the distribution and return of questionnaires, anticipated gaps in the representativeness of the study sample were able to be redressed, where possible, by interviewee selection and interview data. Specifically, the interviewees were able to be selected more equitably across the USP Region, which allowed a regional representation not possible through the quantitative treatment because the questionnaire responses were overwhelmingly Fijian and in particular, Fiji Indian.

Both data collection exercises had, necessarily, to be conducted simultaneously given the logistics involved and the time and budget constraints of the study. Consequently, much of the complementarity of the interview data was left to chance and intuition, and gaps in the questionnaire data were largely anticipated at the outset in the structure and conduct of the interview. Much as it would have been ideal, the opportunity to check questionnaire interpretation within the interview was not possible under the circumstances of this study.

A semi-structured approach to the interview was deemed the best approach in this case. A list of questions was devised in keeping with the major categories of variables of the study (see Appendix 4). This list was used by the interviewer largely as a guideline for questioning although it did not restrict the interview process in terms of the order of questioning or the depth and breadth of the responses. Within interview time restrictions, (posed mainly by the fact that most of the interviews were conducted during the lunch breaks of working students), spontaneous and creative responses by the interviewees were given free rein, particularly if they provided insight into aspects of the lives of the students that explained or part-explained their current dispositions and situations as adult distance students. For instance, many of the respondents spoke at length about significant people in their lives, particularly when they were growing up. Although this information did not feature as a prominent questionnaire response, it was clear that a number of students might not have had the academic inclination or the appropriate commitment to consider returning to formal education and to persist in it without the prior influence of these persons.

The choice of students to be interviewed was made on the basis of several criteria, within time and budgetary limitations. These limitations, for instance, made it impossible for students in all countries of the USP Region to be interviewed. An important criterion for the selection of countries to be visited therefore, was the number of students enrolled in the survey courses in each of the USP countries so that countries with few enrolments were eliminated. This factor was combined with other practical considerations such as airline schedules and affordable fares. In the case of airline schedules, time was of the essence and the availability of flights to and connections between countries within a reasonable timeframe was important for the visit to the countries concerned to be considered. It was fortunate that at the time of data collection, the researcher was able to take advantage of packaged travel schedules involving the visit of three countries and more at a time, at fares that were affordable within the research budget. With this arrangement, Tonga,

Western Samoa and the Cook Islands could be visited in one schedule, and Vanuatu, Solomon Islands, Nauru and Kiribati in another. In Fiji, one student each from Suva, Nadi and Lautoka were also interviewed.

In all, 23 students were interviewed although only 22 interviews were used in the study as one student was a foreigner studying in the Region at the time. As foreign students are only a very small minority of the USP distance education intake, it was felt that this interview would not make a significant contribution to fulfilling the research intentions. The interviewee selection process involved various steps: first, through random selection, up to eight names were selected for each country. These names were then sent to the Centre Directors of USP Centres in the countries concerned, with a request that the students be contacted and an interview time with the researcher scheduled. The names were submitted in order of priority based on limited information available at the time - age, gender, location and ethnicity - so that a good mix per country and overall was achieved. The first three or two students who were willing to be interviewed and available at the time of visit by the researcher, were selected. The researcher's travel schedule was a very important, risk-related part of the process as the availability of the students was based on it. This risk was demonstrated when a connecting flight was cancelled and for the countries yet to be visited at the time, interview schedules had to be rearranged and new people approached to replace interviewees who were inconvenienced by the cancellation.

Eleven of the interviewees were also survey respondents although the order of their involvement in both exercises was not determined. However, there was no reason to suggest from the interview that their dual involvement affected their responses in any way.

All of the interviews were conducted by the researcher paying careful attention to situations of potential bias associated with the interview process (Oppenheim, 1966). The increasing experience gained by the researcher from one interview to the next, and the related awareness of and sensitivity to situations of bias were major advantages and outcomes of this approach.

### 3.5 Data Analysis Plan

Analysis of the data elicited from the questionnaire was conducted in four major phases. These are briefly described as follows. In the first phase, the subjects' responses were cross-tabulated to form a series of two dimensional contingency tables, such as age by gender. This material was essentially descriptive in character and served to provide a profile of key features and variables associated with the study population. Because of the large number of tables that were possible to be generated from the data, only very limited use was made of chi-squared procedures and, in those instances where they were used, care was taken to adjust the overall  $\alpha$  level so as to provide protection against an escalating type I error rate.

In the second phase, subjects' responses to questions that related directly to the conceptual framework specified in Chapter 1 were analysed using the principal components form of factor analysis. This form of factor analysis was used in preference to common factor analysis because the study was exploratory rather than theory-confirming in nature. As such, a wide variety and range of variables are characteristic of this study and the intention of factor analysis was to reduce the data to the minimum number of factors needed to adequately represent the variance in the response matrix. Additionally, since the number of variables in the data set exceeded 30, and the criterion was set that most of the variables would have communalities exceeding 0.60 before the solution would be considered acceptable, it was likely that component analysis and common factor analyses would produce identical results (Hair et al., 1995).

In the third phase, factor scores associated with each respondent derived from the principal components analysis were used in the K-means form of cluster analysis so as to produce a taxonomy of respondents sharing similar features.

In the fourth and final phase, these analysis of variance procedures were used to determine whether the groups formed by the cluster analysis differed in terms of academic performance. Additionally, the factor scores associated with each respondent were used in multiple regression analysis as predictors of academic performance.

In summary, the various statistical procedures used in questionnaire data analyses were selected as appropriate to the general objective of the study to identify those personal and situational variables, and features related to the students' study environments, that were associated with preparedness and disposition to study, and with persistence and performance.

With regard to the interview data, a composite description of the interviewees presented an overall picture of studying by distance as the students themselves saw and experienced it. Following this composite analysis, five interviews were selected for case study presentations, which continued to highlight, in greater detail, the real life experiences of the adult distance students in the USP Region. In so doing, the interview data 'brought to life' the quantitative results of the questionnaire data achieved through the various procedures described above.

### **3.6 Concluding Summary**

Chapter 3 consisted of descriptions of the various aspects of the methodology and design of this research project. It began with a brief discussion of the choice of study design (survey/interview combination), followed by a description of the study population and the programmes of study in which they were involved, as major components of the study. Data collection methods - the questionnaire and interview - as well as the pre-testing of the questionnaire, formed a large part of the coverage in Chapter 3 with brief references to the literature where appropriate. Finally, statistical procedures used in the analyses of the questionnaire data, as well as interview data analysis, were presented.