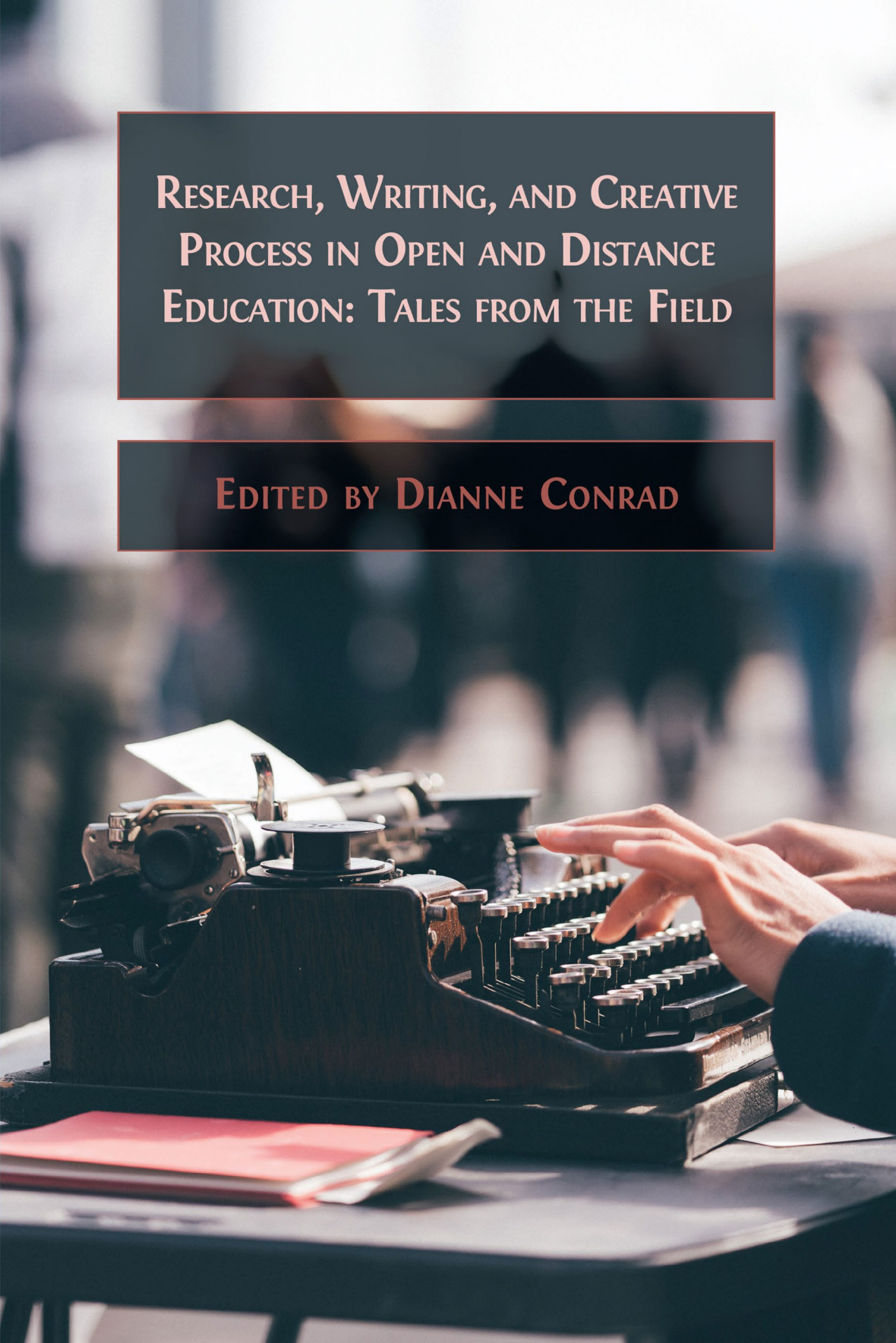
Research, Writing, and Creative Process in Open and Distance Education: Tales from the Field

Edited by Dianne Conrad



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Dianne Conrad (ed.), *Research, Writing, and Creative Process in Open and Distance Education: Tales from the Field*. Cambridge, UK: Open Book Publishers, 2023, https://doi.org/10.11647/OBP.0356

ISBN Paperback: 978-1-80511-094-1
ISBN Hardback: 978-1-80511-095-8
ISBN Digital (PDF): 978-1-80511-096-5
ISBN Digital ebook (epub): 978-1-80511-097-2
ISBN XML: 978-1-80511-099-6
ISBN HTML: 978-1-80511-100-9
DOI: 10.11647/OBP.0356

Cover image: Thom Milkovic, 'Vintage Words' (2017), https://unsplash.com/photos/FTNGfpYCpGM

Cover design: Jeevanjot Kaur Nagpal

11. Serendipity: Becoming a Specialist in Online Learning

Tony Bates

[Spoiler alert!] Writing this chapter was revealing to me as regards my writing process. As you will see from the story that I tell, my journey has been long and slightly dog-legged — which has made it all the more interesting. At present, the rambling journey has resulted in twelve books, many conference presentations and keynotes, much travel, and an ongoing blog that is hosted by Ontario's Contact North/Contact Nord. In short, I have been producing material of and about online and distance learning for a very long time without — amazingly! — really thinking about or analyzing how I am doing it. It simply has become what I do. But there are many contributing factors that have led me to this point, factors that highlight chance, good fortune, and, as the title indicates, serendipity. I am happy to tell my story here.

As the intention of this book is to pass experience and acquired knowledge on to those who may be less experienced, I think recounting my path from "then" until "now" can be both entertaining and insightful.

Beginnings

No one wakes up at fifteen years of age and says: "I want to be a specialist in online learning," particularly in 1954, when TV was still in black and white and needed cat's whiskers for aerials. So how did I get here? It is a tale of twists and turns, a huge amount of luck, and kindness from others.

I guess it started when I was sixteen. My father and mother owned a small greengrocer's shop in Ealing, West London. They were going

 https://doi.org/10.11647/OBP.0356.11

broke. One day my father just upped and left, apparently for what was then Rhodesia, now Zimbabwe. No goodbyes. I never saw or heard from him again. My mother, who was a qualified nurse, sold the shop for a pittance, and got a job as a night nurse in a nearby mental hospital, looking after seventy-two very sick patients; and slowly paid off the debt. She insisted I stay at school and finish my high school exams, which I did.

I did reasonably well at English and French but barely passed Latin. My headmaster was disappointed. I did not have the qualifications to go to Oxford or Cambridge. "Try a couple of colleges at London University — say King's or Queen Mary's." That was the sum of his career advice. I didn't get into either.

So, I got a job. My mother and I needed the money. I started as a bank clerk at a branch in central London, but lost the keys to the front door, and resigned twenty minutes before they fired me. I then worked as a filing clerk for the Southern Railway on what would be now less than a minimum wage for another year. I was miserable: no money, no girlfriend, no future.

The Kindness of Strangers

Over a pint of beer, one of my office colleagues suggested that I might be eligible for a grant from the London County Council (LCC) to take a two-year teacher training course (you didn't need a degree in 1958). On the off chance, one lunch time I went to County Hall, an imposing building on the bank of the Thames, and eventually found the right office. A distinguished looking man emerged, ready to go to lunch. "Can I help you?" he said. I told him that I wanted to go to teachers' college, but I needed a grant. He sighed, took off his raincoat, and asked me to sit down.

"Do you have any O-levels?"
"Yes, ten."
"Oh — how about A levels?"

I told him.

"Why don't you want to go to university?"
"I do, but can't get in."

He laughed. "Your A-levels should be good enough. If you get accepted the LCC will cover your fees and give you a modest but manageable grant for your living expenses."

Transformation at University

Six months later, I was on the train to Sheffield, the first university to accept my application for a Bachelor of Arts general degree. I was still committed to being a schoolteacher. French was my best subject at A-level. The university, though, required all first year General Arts students to take four subjects. They held a "fair" with a table for each of the subjects on offer. As well as English and French, I had to choose two more subjects. I went round the tables. I had done some economics at night school when working at both the bank and the railway, so that was easy. I knew nothing about Psychology, but it was a new and small department at Sheffield and the classes would be small, I was told. That made the fourth choice easy.

I had good work habits, so I got really good marks at the end of the year and was offered a place in both Honours Economics and Honours Psychology. After quite a bit of agonizing (for Economics clearly had better money prospects), I went for Psychology, because it seemed the most interesting area. I went on to get a Second Class Honours, First Division, good enough to get into graduate school.

More Good Advice

Just after the results came out, the Head of the Psychology Department, Harry Kay, asked to see me and asked me what I had decided what to do next year. "I'd really like to do educational research," I said, hoping he would offer me a place as a graduate student. During earlier university vacations, I had taken a job at the National Foundation for Educational Research (NFER), cranking out analyses of variance on a mechanical calculator as part of a study on the validity of IQs.

"Hmmm," said Professor Kay. "I think educational research is a good goal, but before you do research in education, I think it would be best for you to get some experience in teaching first. I suggest you go to

Goldsmiths College (part of the University of London) and get a Post Graduate Diploma in Education, then do some teaching." Which I did.

The Teaching Years

I was lucky at Goldsmiths College. My advisor, Len Marsh, was a constructivist, believing strongly in project work. It was the early 1960s, and there was a great movement towards more modern and innovative ways of teaching, which I thoroughly supported after the sterility of my own school experience.

Additionally, at university, I had been very influenced by the work of Jean Piaget (Inhelder & Piaget, 1958), who argued that learning was a developmental process that went through stages; and by Carl Rogers, who argued that we learn best within social contexts where we construct, test, and build meaning (see, for instance, Rogers, 1969). At Goldsmiths, I was encouraged to put these and other theoretical approaches to teaching and learning into practice, through group and project work and a holistic approach to learning where learning was based on broader, stimulating activities of intrinsic interest to the students. These lessons stayed with me.

Eventually, I got a job at Rashwood, a small rural primary school in Worcestershire. I had a class of forty-two students covering three age grades, from seven to ten years old, and with a range of all abilities. Len Marsh's methods had prepared me well for this situation.

However, as well as beginning to love teaching, I was still keen on doing research. At this time, the primary school curriculum was pretty flexible. My main goal was to ensure that as many as possible maintained and improved their core skills of literacy and numeracy.

Nevertheless, with a class of forty-two, I began to feel that certain kids were getting more of my attention than others. In particular, two or three of the brighter girls were always around my desk. I was getting increasingly worried that some of the quieter or less "pushy" students, especially those struggling with their learning, were not getting enough of my attention, so I hit on the idea of sound recording my lessons. I would then be able to analyse over the Christmas break how I spent my time among the pupils in the first term. Then, I could try to modify my behaviour in the following term. I bought a two-track tape recorder, and

two microphones. I got permission from the Head and sent a letter to all parents asking for their permission to record my lessons for the purpose of evaluating my teaching. They all agreed.

There were two main problems, though, with this experiment. I ended up with so many hours of recording that I couldn't possibly analyze all of it. It was at this point I discovered the value of sampling. The second problem was much more serious. I did find that there were major differences in the amount of time I spent with each pupil. Indeed, I was horrified to discover two children in the class who had never had a one-on-one conversation with me. This situation was contrary to my holistic beliefs about teaching and learning.

I made a determined effort to change that the next term. However, when I analysed the tapes at the end of the second term, there was absolutely no difference — the same kids got just as much time as before, and the same kids who mostly got less time than the other ones continued to do so, although I did manage to spend a little more time with the two previously "quiet" children.

Toward the end of my second year at Rashwood, I was approached by the NFER to see if I was still interested in a research position. However, they wanted me to have some experience of teaching in a comprehensive. With great sadness, I resigned my position to take up a position as a "remedial" teacher in a newly opened, large comprehensive school in Birmingham.

All I can say about the year I spent at Shenley Court is that I learned a lot more than the kids I taught. On the first day of the school year, the Head welcomed the new students and gave a little pep talk about the need for academic excellence in all classes. The school was run on the same principle as the English Football League. As the headmistress explained in her pep talk, every child in the school could excel. The classes were streamed strictly on tests given at the end of each term, and the first-year classes were streamed based on tests at the end of their primary school year. So, at the end of each term, the top two children would "move up" a class, while the bottom two children would go down to the next class. "This way," said the headmistress, "even children who start in Class J — (my class) — can make their way into Class A by the fifth year, if they work hard enough."

The Deputy Head then read out the names of students in each class, and their teacher guided them to their classrooms. One by one, as the classes trouped out and there were just fifteen children left in the room, one of the boys looked at me, and said: "Are we the dummies, sir?" He had already worked out the system.

I was therefore hugely relieved when the NFER eventually offered me a job as a full-time researcher on a three-year contract to work on the comprehensive school project.

Researching Comprehensive Schools

I joined the NFER in September of 1966, just as the research on comprehensive schools was beginning. I was asked to examine "the patterns of school administration and organization and their effect on the teaching staff."

The overall design required me to visit in-person a sample of fifty schools across England and Wales, and conduct interviews in each school with the head, deputy head, two senior staff, two heads of department, two senior teachers and a small group of senior students, for a total of just over 450 interviews. I designed all the questions and conducted all the interviews, as well as doing the analysis and write-up.

What struck me most was how the culture of schools differed so greatly. Some schools were almost silent as you walked in (usually former grammar schools); others were noisy and boisterous (usually the large, inner-city schools in London). The huge difference between small and large schools, and rural, suburban, and inner-city schools, made me realize the importance of culture and different values on the way education is managed and organized. To this day, when I visit England, very early on after meeting a Brit for the first time, I am asked where I was "brought up." This helps the Brit to "place" me. (I tend to vary the answer to confuse the questioner). It is no fluke that thirteen of the last fifteen British Prime Ministers went to Eton or Harrow. You could conclude that it was the school that maketh the man; alternatively, you could conclude that the education system in Britain is deliberately structured to perpetuate the rule of an existing elite.

I was again fortunate to be on an excellent team of researchers at the NFER, getting advice and help on questionnaire design, statistics, qualitative data analysis, and above all, on the politics that come into

play when doing public policy research. I was even more fortunate that the NFER allowed me to take the data I had collected and use them as the basis for a PhD at the University of London. Again, I had a sympathetic and helpful supervisor, George Baron. I obtained my PhD in 1971.

Lessons and Learning at The Open University

By 1969, with my contract with the NFER coming to an end, I needed another job. Between 1963 and early 1969, the idea of a "University of the Air" had developed into a proposal for an open university that would combine correspondence education and broadcasting. It was to be called an Open University (OU), and it would be open to all, with no prior qualifications required. It was sometimes called "The University of the Second Chance" for those that were not able to go to university after leaving school.

Given my own experience of leaving school and failing to get into university, the idea of the Open University really appealed to me, so when a job advertisement appeared in the summer of 1969 for a research officer at the newly created Open University, I jumped at the chance. Luck was once again on my side. Although only one post was advertised, and someone else was offered it, they decided at the interview to hire me as well. In September 1969, I was the twentieth person to be hired at OU.

The immediate task was to do research on the print and broadcast courses that the National Extension College had developed as preparatory courses for potential OU students. The mandate was broad: investigate the effectiveness of distance education in general and bring the lessons learned to the design of OU courses.

Not long after I was hired, at the formal inauguration of the Open University at the Guildhall, in the City of London, Lord Crowther, the first Chancellor of the Open University, gave a very short inaugural speech. He said the university would be open...

- to people, with its open admissions policy,
- to methods, such as broadcasting and print and "other technologies yet to come,"
- to ideas, and
- to time and place, where students could learn and where instructors could teach from anywhere at any time.

This was 1969; yet these ideas still resonate with me today and I am a strong supporter of open educational resources with a broad vision of "open-ness" which I continue to implement in my career.

In doing the analysis of the research questionnaires on the NEC courses, the responses about the print material were calm, thoughtful, and analytical, pointing out areas of difficulty or where the materials were particularly helpful. The responses, on the other hand, to the broadcasts were quite different. They tended to be much more emotional, with extremes of high praise or very emotional criticism.

I was struck by the difference. There's something here, I thought. The two different media of print and television were resulting in qualitatively quite different responses from students. Since the Open University would be spending more than a fifth of its budget on the broadcasts, I thought it might be worth spending a little time and money on evaluating the effectiveness of the programmes. In 1970, I persuaded the new head of The Institute for Educational Technology (IET) that there was a need for a specialist research team that would focus on evaluating the BBC broadcasts. I was appointed a full Lecturer in Media Research Methods in 1971 and in 1973 we were able to establish a small Audio-Visual Media Research Group (AVMRG).

Initially, audio-visual media research covered two main areas. The first was around strategic issues. For instance, there was a constant battle with the BBC in the early days about transmission times. The BBC wanted to push the OU broadcasts into times that were less popular with the public, such as 6 to 7 am, or Sunday mornings. The OU course teams wanted repeat broadcasts, so that if students missed one transmission, they could catch the second. The AVMRG collected viewing data, showing the impact on students of different transmission times and the impact of repeat broadcasts, thus making learning more accessible to learners.

When audio cassettes became available, the AVMRG collected data on cassette recorder availability and the use of audio cassette recordings. Eventually, the research indicated that learning was more efficient if audio cassettes were designed to incorporate the stop and repeat feature to embed student activities or reflection. The OU eventually created a special audio-visual library enabling students to access the recordings at any time, and the AVMRG conducted regular research on the use of cassettes.

My hunch from the NEC Gateway research proved correct. There was often a strong affective or emotional response not only to the television programmes in particular, but also to audio as well. This could have positive or negative results. A good programme could inspire and motivate learners. Some students, though, struggled with programmes that were not didactic, that did not explain in academic terms what was being shown in the programme.

The research also found that students could be taught to use open-ended or documentary style programmes for understanding, applying, or analyzing academic concepts and principles found in the printed texts. As a result of the research, the TV programmes for the re-make of the foundation social science course started with a mainly didactic approach from the main presenter but, over time, the presenter would introduce more and more video clips, initially with explanations of what to look for. In later programmes, he would show clips without guidance, then give his own interpretation afterwards. Finally, the last two programmes were almost entirely documentary-style. The evaluation of these programmes showed that not only did students enjoy these more than the programmes on the original course, but that they also learned more.

This acquired knowledge resulted in my 1984 book *Broadcasting in Education: An Evaluation*, in which I identified two distinct cultures between academics and broadcasters, as well as two different professions with different beliefs and value systems. The BBC's traditions and arrogance made it believe that it was the best broadcaster in the world, that it knew "intrinsically" what made a good programme and therefore was above criticism; academics, on the other hand, were suspicious of the lack of "seriousness" in broadcasting, and its tendency to simplify and trivialize issues. Both arguments have some validity. The important point though is that broadcasting or video can offer a different way to present knowledge that will help some students and annoy others.

Coming to Canada

I was privileged when working at the OU to be able to travel extensively for conferences and to take sabbatical leave to work on projects. I was also very active on the Open University's behalf in a number of European Commission projects, bringing several millions of euros in grant money

to the university. In particular, I worked on several projects on the use of satellites for distance education.

An invitation by Jon Baggaley at Newfoundland's Memorial University to an educational television conference in 1979 really changed my life. Serendipity! I flew to St. John's and arranged with the Extension Division to spend a week visiting the small coastal communities to see and discuss the Portapak videos the communities had made about their livelihoods, based on the Fogo Island process originally developed with the National Film Board of Canada.

When I arrived in St. John's, I was asked to provide a ride to the conference in Corner Brook on the other side of the island for an Englishwoman who had no transportation. Of course, Newfoundland cast its magic spell and, amid amazing Newfoundland hospitality, the Englishwoman and I fell in love. Eventually we returned home and then married two years later.

In 1982 I received a British Council fellowship to visit Canada and research their use of educational media. It was during this trip to Vancouver that David Kaufman of Simon Fraser University invited me into his home office after dinner one evening. He had a computer linked to a modem. This was my first introduction to the internet — and it led eventually to a paper published in the first edition of the (Canadian) *Journal of Distance Education* in 1986 called "Computer assisted learning or communications: Which way for information technology in distance education?" (Bates, 1986). This was a seminal moment for me. I had never been impressed by computer-aided instruction, which seemed to me to be far too behaviourist, but connecting distance students so they could communicate with each other online seemed to me to be much more compatible with my view of learning, as it had to several other pioneer researchers before me, such as Roxanne Hiltz and Murray Turoff (1978) and Linda Harasim (Harasim & Johnson, 1986).

By 1985, my wife and I were determined to find a way to emigrate to Canada. Fortunately, at the 1988 ICDE conference in Oslo, I was approached by Glen Farrell, the President of the Open Learning Agency of British Columbia, who asked if I would be interested in a job as Executive Director, Strategic Planning, Research, and Information Technology. At the time, I felt that, after twenty years, I had done all I could at the Open University. I felt the institution had reached stasis;

I missed the energy and excitement of the early years. Also, I wanted more responsibility as a manager. I had spent too long giving research-based advice and often seeing it ignored. I wanted a piece of the action. And so, following two years of frustration with Canada's immigration process, we finally arrived at the end of 1989 with two cats and a dog.

Lessons and Learning at the University of British Columbia (UBC)

I had five good years at the Open Learning Agency, but in early 1995, I received a call from the Provost at UBC, asking me to give some advice to the university about ways to spend a $2 million grant. I did not realize that this was an informal interview for a job with Continuing Studies at UBC. I was then hired as Director of Distance Education and Technology. The goal was to move the Continuing Studies correspondence programmes online and help the university generally with innovative teaching with technology. My background and previous work in England had prepared me well for this task.

The eight years I worked at UBC were probably the most productive of my life. We moved all the existing distance education courses online, and worked with the faculties to develop wholly online, self-financing master's programmes. We established WebCT as our Learning Management System (developed at UBC by Murray Goldberg) and I was able to bring all my experience as a teacher and philosophies of learning to the design and delivery of these programmes.

However, over time, it became clear that online learning and technology-based teaching needed to be managed across the institution. In 2003, a new senior administration decided to close the Distance Education and Technology unit in Continuing Studies, since most of its activities were with the main faculties; and move its assets, such as instructional designers and funding, directly to the faculties.

This did not work out well. The smaller faculties suddenly found themselves responsible for activities that they did not have the resources or expertise to manage properly, and two years later it was decided to merge the faculty development office and the distance education unit into a new Centre for Teaching, Learning and Technology, reporting directly to the Provost.

This was the right decision as there is a continuum between face-to-face teaching and fully online; but there are also many different possibilities in between, such as blended learning. Distance education, blended learning, and lifelong learning are critical activities for all mainline faculty departments these days. It is too important to be isolated outside the mainstream programmes, but rather it needs a central home so that expertise in different areas can be shared. UBC now has a mixed model, where the larger faculties have their own learning technology support staff but can also draw on central services when needed. This model has worked well for UBC and has helped them manage the move to emergency remote learning during COVID-19 without too much pain.

Moving On... Again

However, by 2003 I was considered redundant by the new administration, especially as I was coming up to mandatory retirement a year later. Upon my termination by UBC, I wanted to stay engaged with online and distance learning. I had brought lots of research grants and consultancy work to UBC, so I set myself up as a private consultant. Since then, I have been continuously working with clients all round the world. This has allowed me to be productive well into my 80s. I now feel that I have at last become a specialist in online and digital learning.

Everyone's life is idiosyncratic; it belongs to them and no one else. But there are some lessons from my life that I would offer to those wanting to do research or to teach. Ten important lessons that I can share are listed below:

1. Follow your passion: mine was teaching and research. I spent two years after school in misery, not following my passion. I've been lucky enough since then to spend almost all my life on these two passions. Despite the ups and downs, I've never regretted this.
2. Move to where the action will be. In research, you get much further researching topics that (a) very few others have researched before, and (b) are likely to be important in the future. This may often not fit with your academic department's interests, in which case find someone or somewhere else with an interest in these topics.

3. Money matters in research. If you can bring in research grants or consultancies or persuade your administration that research and consultancies will directly benefit the organization, you will have more influence than working in isolation, and more opportunities for further research.
4. Avoid the comparison trap in educational technology research: for example, is online learning better/worse than in-person teaching? (Answer: There is no significant difference). There are many ways to teach well. It's not the technology, but how you use the technology that matters. You can teach well or badly, online or in class. Thus, it is the *conditions* that determine the effectiveness of a medium or mode of delivery.
5. Choose a topic for your PhD where the results will have value outside the actual study. Make sure it is relevant to real-world issues so that you and others care about the research and its outcomes. If your work provides access to unique data, use them for your PhD. A PhD should not be done just to get another qualification, no matter how important that is to you. A PhD is a hard and risky endeavour; make sure the end result will be worthwhile.
6. Be eclectic in your choice of research methods. In education, you need both qualitative and quantitative research. Different topics need different methods.
7. Work with others: two heads are better than one, both in teaching and in research. You not only learn more in a team, but you also get better results.
8. *Culture* — the embedded (and often unquestioned) values and beliefs within an organization or department — is a very powerful brake on change. You need to understand and lever the culture to bring about lasting and effective change.
9. Listen to your critics, no matter how dumb or misinformed they appear to be. If you don't listen to or understand their position, you will not be able to change things. If you are not teaching or doing research to make a difference, then give up and do something else.

10. The most important thing in a teacher is to care about your students and their success. This goes far beyond merely "covering the curriculum." Our students are literally our future. Learn what they need to succeed and do your damnedest to provide that. This will give you — and them — tremendous satisfaction. Otherwise, choose something else.

It has been a long and adventurous journey. Without the help of others, often strangers, and without a lot of luck, or serendipity, who knows what I may have been?

I don't envy anyone setting out today and trying to map their future. You need both persistence and flexibility — the ability to see an opportunity and go for it. Above all, you need some luck and help from others. Serendipity needs to be recognized, exploited, and built upon. So, good luck!

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