

6: How do you set it up?

Once a political decision has been taken to look into the establishment of a distance-teaching institution, or to establish one, it is necessary to draw up plans which are at a finer level of detail than the discussion in this book. In some cases governments have decided to establish a new institution after the minimum of preliminary study and paper work. In others, lengthy documents have addressed the broad policy issues discussed here and gone beyond them. Once broad policy has been agreed, there is a further set of issues which determine the agenda for a planning committee or whatever other group is responsible for moving from policy to implementation. Although the distinction is somewhat arbitrary it is convenient to consider separately what needs to be done in the planning phase before an institution is formally established and what follows in a development phase when funds are committed and the first staff identified.

6.1 Who should do the planning?

Governments and universities have often found it useful to set up a planning committee in order to develop an outline plan for a new distance-teaching institution. This has not always been done. In some cases a university has simply agreed that an individual department should launch a programme of distance education and left the planning to that department. In others an educational charity has launched a new distance-teaching institution as an extension of its existing activities. But there are often merits in bringing together a group of people, who combine prestige and expert knowledge, in order to draw up outline plans. Such a committee may report to government, or to a university, or to a body of trustees.

Any planning committee is likely to have a role which goes beyond the technical one of examining the demand for distance education and the ways in which this can be met.

In the distance teaching university planning process, the appointment of a *prestigious* Planning Committee is a key event. The appointment of the Committee signifies and underlines the Government's intention to proceed. Moreover, when the membership of the Planning Committee comprises eminent and respected academicians and educationalists, their recommendations cannot easily be dismissed.

Dodd and Rumble 1984, p.241

While the size and membership of a planning committee will depend on local circumstances, there are obvious advantages in ensuring that it represents some of the groups who will be affected by the establishment of a new institution, which may include other educational bodies, employers and trade unions, and broadcasting authorities. Some

governments have brought on to their committees members or consultants from another country with specialist knowledge of existing distance-teaching institutions.

6.2 What needs to be done in the planning phase?

In the planning phase it will be necessary to examine the broad goals to be met by a new institution, the educational activities that flow from them, constitutional and organisational ways of meeting them, finance, staffing and the phasing of development.

6.2.1 Goals and purpose

Taking account of earlier decisions about the broad purpose of a new institution, it will often be necessary to carry out further enquiries into the nature of the educational needs to be met and the characteristics of the potential students.

6.2.2 Educational activities

From this consideration of educational needs it is possible to make preliminary decisions about the kind of courses to be offered, and in some cases about the course structure. At this stage, too, decisions are needed about the teaching methods to be adopted and about how teaching materials are to be developed.

6.2.3 Constitution

Planning committees have usually resolved questions about the constitutional status of a new institution and drawn up the necessary constitution, charter or legislation within which it will operate. At this stage it is necessary to resolve questions about the power of a new institution to award credit in the form of diplomas and degrees.

6.2.4 Organisation

The organisational structure needs to take account both of the constitution and of the teaching methods that will be used. It will be necessary to resolve questions about the extent to which the new institution should be centralised, about the development of any regional structure and about the way in which it will relate to other educational bodies. Operational systems will need to be designed for the production, storage and distribution of teaching materials and for enrolling and supporting students.

6.2.5 Finance

There are three financial issues to be considered. The first is to determine the sources of funding and the balance between them (see para. 5.5 above). The second is the budget, which probably needs to be determined in some detail for the first two to three years and in outline for the first five years. The third is the

system that will be used for financial management and control.

6.2.6 Staffing

Decisions about the purpose and structure of the institution lead on to ones about staffing. Planning committees have often continued their work as far as the appointment of the head of a new institution. They are, in any case, likely to agree the job description and terms of service for such a person.

6.2.7 Phasing

A key component in the planning phase is the timetable of activities to launch the new institu-

tion. At the least, the timetable needs to set out the stages from the completion of the work of any planning group until students are enrolled. At most it may extend from the beginning of the planning phase until the institution has reached steady state.

Box 6 summarises experience from a number of planning committees.

6.3 What staff will you need?

Decisions about staffing will depend on the educational job to be done and the organisational model chosen. Among its full and part-time staff, a distance-teaching institution may need:

Box 6: Planning committees

The Characteristics of DTU [Distance Teaching University] Planning Committees: Summary of Main Points

In the DTU planning process, the appointment of a prestigious Planning Committee has been a key event.

Planning Committee membership numbers have ranged from three to nineteen persons. The membership has rarely included public broadcasting representation [although this is often advisable].

The timescales within which Planning Committee have operated have ranged from three months to several years.

Interim reports issued by the Planning Committee have served not only to test opinion on the Committee's initial proposals but also to safeguard the DTU planning initiative.

Representatives of DTU Planning Committees have commonly travelled overseas on fact-finding visits to other DTU institutions . . .

DTU planning and development has been stimulated and promoted by national and international aid agencies, by intergovernmental aid agreements, and by DTU institutions . . . providing overseas consultancy services.

Continuity in the membership of the Planning Committee and the new DTU's highest policy making bodies has been a common feature.

. . .

The Content of DTU Planning Committee Reports

The main issues which the Reports . . . have addressed are these:

1. Shortfalls in the national provision of higher and further education opportunities.
2. The potential of distance education as a solution to (1).
3. Distance education practice and experience nationally and internationally.
4. The new DTU proposed by the Planning Committee:
 - (i) Institutional objects;
 - (ii) The target audience;
 - (iii) Study programmes and awards;
 - (iv) Admission criteria;
 - (v) Study methods, media, timescales;
 - (vi) Local student support;
 - (vii) Institutional organisation and administration;
 - (viii) Institutional staffing;
 - (ix) Finance;
 - (x) Relationship with other institutions;
 - (xi) Proposed start date.

Dodd and Rumble 1984, pp 249-252

Educational staff

subject specialists
specialists in the production of materials
specialists on tutoring and counselling
tutors (especially part-time tutors)
broadcasting producers
research workers and evaluators

Materials production staff

printers
copy editors
graphic designers
broadcasting technicians
typists, typesetters, calligraphers

Administrative staff

administrators and managers
personnel staff
financial staff
clerks
secretaries and typists
messengers, janitors, drivers.

Many, but not all of these, will be in the headquarters office. Where, however, staff are decentralised they are likely to require the appointment of co-ordinators within the headquarters. A tutorial service in the field, for example, is likely to demand the establishment of a unit to co-ordinate and supervise field activities from the headquarters.

Arrangements will also be necessary for the training of staff which may be done on the job, by means of short courses at the institution, by sending students on full or part-time courses, or by enrolling them in an appropriate course taught at a distance. The choice of organisational model will influence the training strategy. Within a bimodal institution, for example, where a course writer is combining that role with one of teaching face-to-face courses, sensitivity is needed in arranging courses for experienced university teachers on the writing of teaching materials, and these need to be timed so that they fit with the writer's other commitments.

6.4 What is left for the development phase?

Decisions taken in the planning phase may carry authority while those taken by the permanent staff in the development phase will be marked by a realism and commitment: the decision-makers will have to live with their consequences. To a great extent this next set of decisions will be an elaboration of those taken before and during the planning phase. In order to allow for continuity, many institutions have arranged for members of a planning committee to continue as board members or advisers once the institution moves into the development phase.

The recruitment and training of staff will be a priority in this phase. If job descriptions, terms of service and salary scales have not been agreed in the previous phase this will need to be done for both full-time and part-time staff, as will arrangements for staff training and development.

Once staff are in post, work can begin on the development or acquisition of educational materials, coupled with the necessary work on curriculum development and teaching methods and on the

establishment of the institution's administrative structure and procedures. Trade-offs may be needed between educational and administrative pressures: academic policy will be influenced by what is administratively feasible. At this phase, too, the new institution will need to elaborate and put in place its operational systems.

6.5 How long will it take?

It is dangerous to be dogmatic about the length of this, as of the previous, phase. On the one hand it is risky to start a programme until all its elements are in place, tested and working. On the other, there is often a political commitment to launch a new institution and recruit students at the earliest possible date. It may be possible to resolve this dilemma by launching a small number of courses, for limited numbers of students, on a pilot basis. Hazards remain of course: some of the problems of distance education are ones of scale that do not show up in a pilot while, on the other hand, the commitment that leads to the establishment of a pilot is often so strong that any pilot results are acclaimed a success.

Some large and well-funded institutions have found it possible to launch pilot courses within little more than a year from the appointment of the first senior staff. Others have moved to a fairly full programme within about two years. Shorter time scales than this are likely to have attendant risks as the processes of establishing an administration, and of developing or adapting teaching materials are necessarily complex and often novel for at least some of the staff who undertake them.

The moral, which is easier to preach than to achieve, may be to seek a phased development, bold and imaginative enough to command continuing public and political support, modest and careful enough to maximise the chances of success.

Summary

The detailed planning of a new distance-teaching institution has often been the responsibility of a planning committee which is at its most effective if it combines prestige and expert knowledge.

Plans generally need to consider the goals and purposes of the proposed institution, its educational activities, a possible constitution, its organisation, finance, staffing and phasing.

While the staff structure will depend on the organisational model chosen, a distance-teaching institution is likely to need staff with skills in education, in materials production and in administration, some of whom may work in a central location but some of whom may be decentralised.

In the development phase it is then necessary to recruit staff, work on the detail of educational programmes, and put in place the structures outlined at the planning stage.

Pressures to start a new institution quickly may be met by running pilot activities but a lead time of about two years is likely to be needed between the appointment of senior staff and the launching of regular programmes.