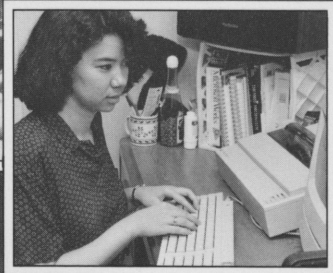
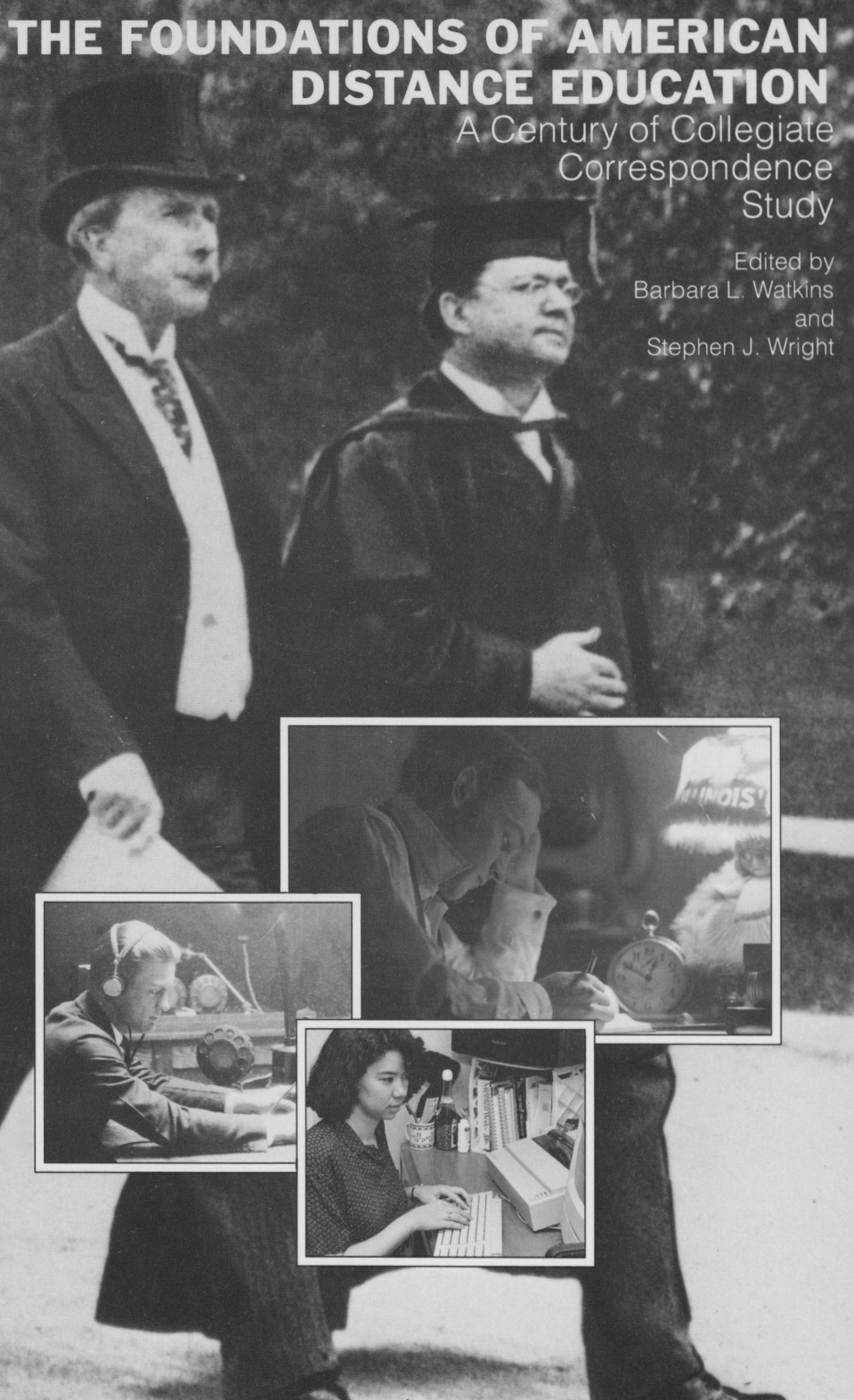


THE FOUNDATIONS OF AMERICAN DISTANCE EDUCATION

A Century of Collegiate
Correspondence
Study

Edited by
Barbara L. Watkins
and
Stephen J. Wright



*The Foundations of
American Distance Education:
A Century of Collegiate
Correspondence Study*

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KENDALL/HUNT PUBLISHING COMPANY
2460 Kerper Boulevard P.O. Box 539 Dubuque, Iowa 52004-0539

Cover design: Jeannot Seymour

Cover photographs: John D. Rockefeller, University founder, and William Rainey Harper, University president, at the University of Chicago in 1896, University of Chicago Archives

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ISBN 0-8403-7101-2

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Printed in the United States of America

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Preface

A century after correspondence study began in the United States, the Independent Study Division of the National Continuing Education Association has launched an ambitious project to record the history, achievements, ideas, issues, and research pertinent to practitioners, faculties, and students in distance education.

The publication of *The Foundations of American Distance Education: A Century of Collegiate Correspondence Study* offers the profession an opportunity to gain a sense of perspective on the past, as well as on the present, that will help prepare to meet future challenges.

Within this field, it has been common to cite two periods of historic development, each of which was connected to the publication of a book that had important consequences. The first is Bittner and Mallory's *University Teaching by Mail* (1933), which describes the origins of the field and the integration of correspondence study into American universities, and the second is Wedemeyer and Childs' *New Perspectives in University Correspondence Study* (1961), which assesses the incorporation of new technologies. In addition, the two volumes of the *Brandenburg Memorial Essays on Correspondence Instruction* (1963 and 1966), which were products of a distance education "summit" seminar in the early 1960s, prompted a new professionalism. Correspondence study practitioners began to take a modest pride in their own profession, and to insist upon steadily raising the professional level

of their own scholarship and teaching. It is my hope that this new volume will have a similar influence on the profession.

The past century of correspondence instruction has been a remarkable period of growth and challenge. Present demands are equally enormous: integration of more sophisticated media in instruction and management, improvement of testing and evaluation, and meeting the educational needs of an increasingly diverse population.

In the past century the proliferation of the correspondence study/independent study/distance education movement has generated educational change throughout the world. Today researchers and practitioners bring into the field new concepts, perceptions, and scholarship, as well as new teaching-learning models.

The lessons of the past emphasize that much hard work, innovation, and initiative are necessary to keep pace with the challenges of the times. The articles in this volume provide opportunities for reflection, practical information, and guidance for independent study's second century.

Charles A. Wedemeyer
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of Education Emeritus
The University of Wisconsin-
Madison

Introduction

To commemorate the centennial of collegiate independent study in the United States, the Independent Study Division of the National University Continuing Education Association has prepared this anthology reflecting the history, the current state of practice, and the prospects for the future of this dynamic methodology in the field of higher education.

As it celebrates a century of progress and achievement, this anthology records the historical evolution of university-based independent study and fosters the exchange of ideas among professionals within the National University Continuing Education Association's Independent Study Division. It focuses attention on the major issues faced by independent study programs within NUCEA institutions and provides information based on research in the field that will be of use to practitioners, academic faculty, and students in the evolving field of distance education.

This anthology represents the culmination of five years' effort by members of the Independent Study Division. In 1986 a task force was established to prepare a proposal for an edited book of articles on collegiate independent study in celebration of its centennial. In 1988 the Administrative Committee of the Independent Study Division appointed an editorial board to guide the project and selected the anthology's coeditors. The editorial board then suggested chapter topics and chose respected practitioners and scholars to write these chapters.

In chapter 1 Barbara Watkins traces the historical evolution of correspondence study from its beginnings in Europe to its establishment in the United States in the late nineteenth century. She analyzes the growth of collegiate correspondence study from its founding by William Rainey Harper at the University of Chicago in 1892 to the end of World War II. Watkins assesses the issues and innovations, as well as the growth of a professional identity, that were central to the development of correspondence study in its first half century.

In chapter 2 Stephen Wright looks at the rebirth of correspondence study in the late 1940s and 1950s through the efforts of leading practitioners Gayle Childs and Charles Wedemeyer. At the heart of the modern collegiate independent study movement is the work of professionals within the Independent Study Division of NUCEA. Wright discusses the accomplishments of recent decades and the new challenges posed by the international distance education movement.

Sylvia Rose discusses in chapter 3 the noncredit correspondence study program that developed at the turn of the century at the University of Wisconsin. She describes exemplary programs at Wisconsin and other universities that illustrate the particular flexibility of noncredit programming. Rose argues that university-based noncredit courses continue to meet unique and challenging needs of adult learners.

Roger Young and Monty McMahon address the topic of university-sponsored high school independent study in chapter 4. The authors discuss the concept "supervised correspondence study" and follow its development at the University of Nebraska. Serving the needs of geographically isolated students and the use of computer technology are two important elements of the university-sponsored high school correspondence study story.

In chapter 5 Von Pittman provides an in-depth treatment of the academic credibility and image problem experienced by collegiate correspondence study. Pittman traces the image problems to the scandals involving the proprietary correspondence schools.

The struggle between the elitist and democratic traditions of higher education, combined with the divergent views on the proper use of technology in collegiate independent study, provides the setting for Pittman's look at quality and image.

Marvin Van Kekerix and James Andrews address the controversial topic of electronic media and independent study in chapter 6. The authors examine some of the problems of teaching and learning by correspondence and media's promise to solve these problems. Whether the technology is the telephone, television, teaching machines, or computers, the issue has been how to incorporate these media to improve correspondence instruction. Van Kekerix and Andrews analyze the all-important issues of cost and learner access posed by electronic media.

Ronald Malan, Dane Rigby, and Lee Glines provide a comprehensive look at the support services component in contemporary university independent study departments. These authors describe several new technological applications that improve service and enhance communication. To accommodate their students' needs, modern independent study departments must supply a host of services ranging from counseling to record keeping.

Harold Markowitz, Jr., indicates in chapter 8 that professional status within the field of collegiate independent study has grown in proportion to the level of staff education and training. Practitioners at institutions with both large and small independent study programs today possess more advanced academic credentials than was the case several decades earlier. Markowitz examines the role and status of faculty who are affiliated with independent study instructional programs.

In chapter 9 Nancy Gaines and Elizabeth Houdek provide an in-depth profile of the role of editors, based on an extensive national survey. They assess the transformation of this role, in light of new publishing technology. The authors examine the collaborative process of independent study course editors and faculty authors.

Charles Feasley addresses the topic of research and documentation in chapter 10. He provides a needed overview of both qualitative and quantitative approaches to research in education and also analyzes the place and role of traditional independent study within the larger context of distance education. Feasley suggests that new powerful statistical-analysis software will facilitate more joint research projects and publications.

In chapter 11 Morris Sammons looks at strategies for designing independent study printed materials to more effectively engage learners in the course subject matter. He analyzes the potential of various learning strategies for improving instructional design practices. Sammons focuses on applications of recent research in cognitive psychology to independent study.

Robert Simerly introduces the term “anomie” in chapter 12 as he discusses the feeling of powerlessness many independent study practitioners experience in the university setting. Simerly suggests a series of action steps to overcome this malaise. The author stresses the importance of hiring individuals with the best academic credentials to enhance the legitimacy of independent study.

In chapter 13 Michael Moore traces the growth of the international distance education movement from its origins in American independent study to the founding of the British Open University and the wave of enthusiasm for open learning that has spread worldwide. Moore explores the history and contributions of the International Council for Distance Education. He predicts a heightened role in the international distance education movement for U.S. practitioners.

Coeditors Barbara Watkins and Stephen Wright assess the future of collegiate independent study in chapter 14. The omnipresent themes of image, identity, and technology applications in the field are considered, along with concerns for a more central position within the administrative structure of the American university.

Several individuals have been particularly supportive in the preparation of this volume. Editorial board members Harold Markowitz, Jr., Von Pittman, and Marvin Van Kekerix provided advice and consultation throughout the project. Other Independent Study Division members who provided information on the history of their institutions or photographs, critiqued portions of the manuscript, or provided administrative support include Mary Beth Almeda, Nancy Colyer, Charles Feasley, Ron Malin, Monty McMahan, David Mercer, Sylvia Rose, and Roger Young.

At the University of Kansas Donna Butler, Independent Study's managing editor, helped in the editing process and Malcolm Neelley and Joan Davies of the Publication Services staff provided expert word-processing and layout assistance. Lynne Lipsey at the University of Kansas and Marie Eysenbach at the Pennsylvania State University helped oversee the project accounts. Gary Abdullah, PSU promotions and marketing specialist, assisted in the advertising campaign for the book.

The National University Continuing Education Association provided financial support for the production of *The Foundations of American Distance Education: A Centennial of Collegiate Correspondence Study*.

To all of these people, we owe large debts of gratitude.

This volume illuminates the challenges and changes correspondence study has faced in the past century. That this profession has survived, and, indeed, flourished is a fitting tribute to the many practitioners who have devoted their careers to independent study.

Stephen J. Wright
Barbara L. Watkins

Chapter 1

A Quite Radical Idea: The Invention and Elaboration of Collegiate Correspondence Study

Barbara L. Watkins

The contours of correspondence study today have been shaped by several forces, especially the nineteenth-century popular education movement and the rise of university extension in both Great Britain and the United States. The history of university extension and of correspondence study in particular tells us a great deal about the place and role of higher education in this country.

This history is the story of creative adaptation, visionary leadership, financial challenges, politics both internal and external to universities, and, most importantly, a commitment to service. This commitment has taken different forms and avenues, sometimes swerving or faltering in the face of adversity or indifference; yet, it has continued and, indeed, grown. Perseverance and flexibility have been hallmarks of this first century.

The Road to University Extension¹

One of the earliest documented instances of correspondence instruction was in Berlin, Germany, where Charles Toussaint and Gustav Langenscheidt formed a school to teach languages by correspondence in 1856. The primary origins of university-level correspondence study in the United States lay, however, in the educational ferment in nineteenth-century Great Britain. Unlike in the Middle Ages, when universities were open to anyone who desired to learn, the English universities had by the nineteenth century become bastions of the privileged.

University extension came into being as a means of giving teachers and workingmen contacts with a deeper intellectual life. These groups voiced their desire for such enlargement and deepening of their lives. The university did not initiate the movement. It was not an attempt on the part of institutions of higher learning to make knowledge less cloistral, less aristocratic. Somewhat reluctantly the university left the calm of the world of scholarship to mingle with the hot and dusty turmoil without. (Hall-Quest, 1926, p. 265)

Although a proposal in 1850 by an Exeter College fellow to extend university instruction to a broader clientele did not materialize, systems of popular lectures were organized soon after—by Oxford in 1857 and Cambridge in 1858. A Cambridge lecturer, James Stuart, also initiated several features that came to be associated with university extension and ultimately with correspondence study: a “printed syllabus,” written work, and local examinations (Portman, 1978). Although the British extension movement was a response to the particular circumstances of the English educational environment—for example, the Victorian social structure and the failure of the government to adequately provide state-supported educational opportunities—its problems foreshadowed those Americans would later face: inadequate funding, uncertain support of university administrators, and faculty criticism or indifference (Woytanowitz, 1974). Yet university extension spread

¹The terms “university extension” and “correspondence study” were often used interchangeably well into the twentieth century. Extension credit was offered through correspondence study, direct class instruction, or both.

in the next quarter century to virtually every English university and to the European continent, Australia, and the United States.

During the nineteenth century in the United States several ventures in adult education preceded the organization of university extension. The popular lyceum movement, begun by Josiah Holbrook of Connecticut in 1826, brought education and entertainment to local audiences. Although the lyceum movement faded after the Civil War, a Methodist bishop, John H. Vincent, organized a similar program, the Chautauqua, in western New York in 1873. That same year Anna Ticknor created the Society to Encourage Studies at Home, which offered educational opportunities to women of all classes. This Boston-based, largely volunteer effort provided correspondence instruction to 10,000 members over a 24-year period despite its resolutely low profile (Agassiz, 1897; Ticknor, 1891). Its roster of instructors, which reads like a "Who's Who of Northeastern aristocracy" (Gerrity, 1976, p. 32), included names such as Adams, Channing, Longfellow, Lowell, and Peabody. Student praise of the Society was effusive. Despite the lack of advertising, Ticknor's work was recognized in several national publications, including the *Atlantic Monthly* and the *New York Tribune*. Bittner & Mallory (1933) suggested that the Society to Encourage Studies at Home "died out" at the turn of the century because it failed to adjust course material to student needs.

Before its demise, the Society influenced the development in 1883 of the short-lived Correspondence University, which was headquartered at Cornell University. The Correspondence University never got off the ground, despite much initial fanfare (Gerrity, 1976).

At the summer Chautauqua institutes, participants combined religious instruction and secular education. Thousands flocked to these institutes, but relatively few finished the four-year reading program and earned certificates. From 1883 to 1891, the Chautauqua College of Liberal Arts, directed by William Rainey Harper, professor of Hebrew at Yale University, was authorized by the state of New York to grant academic degrees to students who successfully completed work at the summer institutes and

by correspondence during the year. Harper believed that correspondence study "would not, if it could, supplant oral instruction, or be regarded as its substitute." Yet, he stressed, "there is a field for each which the other cannot fill." He predicted

The student who has prepared a certain number of lessons in the correspondence school knows more of the subject treated in those lessons, and knows it better, than the student who has covered the same ground in the classroom.

The day is coming when the work done by correspondence will be greater in amount than that done in the class-rooms of our academics and colleges; when the students who shall recite by correspondence will far outnumber those who make oral recitations. (cited in Vincent, 1885, pp. 92-93)

The Chautauqua drew support from prominent university faculty including Harper, and Johns Hopkins University faculty members Richard T. Ely, professor of political economy, and Herbert Baxter Adams, professor of history. Ely suggested in his autobiography that no one could "understand the history of this country and the forces which have been shaping it for the last half century without some comprehension of that splendid institution [the Chautauqua]" (cited in Grattan, 1955, p. 175).

The lyceum and the Chautauqua helped pave the way for university extension. Ironically, however, Vincent's vision of life-long learning was both the impetus for the Chautauqua movement's success and the cause of its decline in popularity (Gerrity, 1976). Ultimately, the colleges and universities that shared his vision would acquire the resources Chautauqua lacked to firmly establish a range and diversity of adult education opportunities.

In 1877 Illinois Wesleyan University arranged a series of courses to be taken *in absentia* by nonresident students. Since Wesleyan was the first American university to offer a plan of correspondence education based on the Oxford, Cambridge, and London model, the beginnings of correspondence study in the United States might properly be dated from this venture. Designed to

fulfill an "urgent and legitimate need," this ambitious program offered bachelor's, master's, and doctoral degrees to "mature individuals throughout the United States who desired to pursue a collegiate course but whose professional duties or financial situation prohibited attendance at a regular college" (Cates, 1965, p. 16).

Although the university's program enrolled 750 students between 1881 and 1890 and reached its zenith in 1900 when 478 students sought nonresident degrees, members of the Wesleyan Board and educators across the country felt that this program was not of "sufficiently high standard of excellence" (Cates, 1965, p. 19)—despite safeguards of academic quality and integrity—and recommended that it be terminated by 1906.

Meanwhile, in Philadelphia, George F. James, George Henderson, and Herbert Baxter Adams organized the American Society for the Extension of University Teaching in 1891. Conflict quickly developed between Chautauqua and Society supporters over issues of instructional quality and methodology, including a Society proposal to do correspondence work.

The American Society for the Extension of University Teaching organized the first national extension conference in 1891. Delegates to this conference reported "incredibly diverse" activities across the country. "Despite the best efforts of the American Society to provide a set of national norms, universities and societies throughout the country deviated from the norms" (Woytanowitz, 1974, pp. 52–53). The conference failed in its efforts to nationalize extension. The future of American extension and, consequently, correspondence study, would lie in local adaptations of the English model.

Leadership for the development of university-level extension throughout the nation was provided by Herbert Baxter Adams. Like Vincent and others, Adams had observed the English extension system and had been active himself in the Chautauqua movement. The foremost historian of his day, he also helped found the American Historical Association. Adams saw in the extension

movement "an escape from the fragmentariness and discontinuity of subject-matter inherent in any scheme of single lectures unaccompanied by any other discipline than voluntary attendance" (Grattan, 1955, p. 185). He lectured about the English system to American audiences and imbued his history seminar colleagues and graduate students at Johns Hopkins with his enthusiasm for the extension movement. Ultimately his students, who included Frederick Jackson Turner and Frank Blackmar, would carry on his extension work at the universities of Wisconsin and Kansas. Fueled in Baltimore, the fires of extension were carried across the country by winds of intellectual ferment and educational expansion. In the Midwest its smoldering cinders burst again into flame.

Localism in the Midwest: New and Difficult Paths

The University of Chicago

Sharing Adams' enthusiasm and influence, the person perhaps most responsible for initiating collegiate correspondence study was William Rainey Harper, whom John D. Rockefeller enticed to organize the new University of Chicago in 1890. Harper's experience directing the Chautauqua summer sessions and correspondence program had convinced him that extension should be "organically related" (Woytanowitz, 1974, p. 62) to a university, rather than exist as a Chautauqua function. The university connection would provide financial security and help solve the frustrating problem of finding willing and competent lecturers. Buffered with Rockefeller money, the University of Chicago opened in 1892 and enrolled its first correspondence students that same year. Three of the university's five divisions, including University Extension, were new to the American university. The University Extension Division included five departments: lecture study, class study, correspondence teaching, library, and training depart-

ment (Bittner & Mallory, 1933). The organization of the new university clearly resembled that of the Chautauqua Institute (Gould, 1961).

The Correspondence-Study (later Home-Study) Department's early guidelines prescribed a student profile, enrollment regulations, rules for granting credit, and control of course content by academic departments that would influence collegiate correspondence study for the next century:

Applicants for correspondence instruction must be 21 years of age and must satisfy the University of their inability to secure classroom tuition. . . . Fifty percent of work for the bachelor's degree, thirty-three and one third for the doctorate may be taken by correspondence. . . . Heads of departments must approve examination questions. . . . The method of instruction is by formal and informal correspondence. (cited in Bittner & Mallory, 1933, pp. 19-20)

Harper's "dedication to the discovery and dissemination of truth for the good of Man" (Storr, 1966, p. 64) was evident in the university's organization and concentric circles of instruction: the core was to be the faculty and campus students. The next circle consisted of students and faculty of affiliated institutions, then came scattered lecture study and correspondence students, and the outside circle was the general public. All were to be served appropriately by flexible instructional methodology.

Harper sought to attract lecturers experienced in extension instruction. Although he failed to lure Herbert Baxter Adams from Johns Hopkins, he was successful in enticing Richard Moulton, "England's foremost lecturer" (Woytanowitz, 1974), and several prominent American lecturers. Despite the early enthusiasm for Chicago's extension program, the wearing travel, the interminable grading of lessons and examinations, and the generally marginal position of extension instruction dampened the spirits of even the most energetic, committed faculty.

Although faculty energies flagged and accusations of financial mismanagement bedeviled administrators, the early extension experience of the University of Chicago was generally



John D. Rockefeller, left, and William Rainey Harper in academic regalia in 1896. Harper's visionary leadership and Rockefeller's financial support were instrumental in creating the University of Chicago. The Correspondence-Study Department was a central unit in the new university's extension division.

successful—in part because the University of Illinois failed to mount a rival organization (Woytanowitz, 1974). Under Hervey D. Mallory, secretary of correspondence instruction, the program “prospered exceedingly” (cited in Gerrity, 1976, p. 60). More than 3,000 students enrolled annually in 350 courses offered by 125 instructors. Reviewing correspondence study’s first decade at the University of Chicago, Harper commented that “academic traditions have been respected” (Bittner & Mallory, 1933, p. 22), largely because the instruction had been by campus faculty. Mallory went so far as to suggest that campus students be required to do part of their academic work by correspondence. He also recommended that “this work, which has proven its worth, be put on the same basis as residence work and not be expected to pay for itself” (Storr, 1966, p. 203). Harper declined the suggestion.

In his last years Harper seemed to lose interest in correspondence study as other university matters—most notably, budget deficits—loomed before him. Units of the experimental university that he had created, including its extension activities, had become commonplace across the nation and perhaps no longer excited his creative energies. The refinement of correspondence study would be left to others.

The University of Wisconsin

To the north of Chicago, in Madison, Wisconsin, another significant and ultimately even more influential venture in extension began. From its earliest years the University of Wisconsin regents espoused the democratic tradition. The University’s policy, they announced in their Annual Report for 1845, would be to “extend the advantages of education . . . as far as may be practicable and expedient, so as to benefit the greatest number (Curti & Carstensen, 1949, Vol. 1, p. 22).

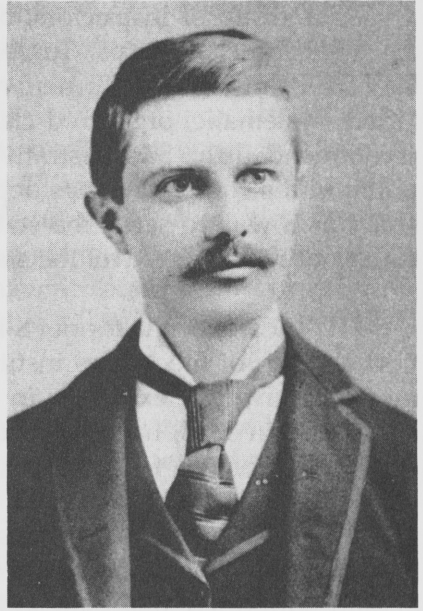
Although there were distinct parallels in the structure of correspondence study at Chicago and Wisconsin, the nature of the

two universities—one private, the other land grant—meant profound differences in their development and in the forces that shaped their history.

The origins of the land-grant institutions lay in the availability of public lands, industrialism, and the expansion of public schooling, as well as the growing labor movement. All helped mold the western university and ultimately the course of correspondence study. Prior to the Morrill Act of 1862, the public higher education movement was, according to historian Earle D. Ross (1942), "tentative in scope and impermanent in support: there was a lack of recognized standards, systematized subject matter, effective methods and adequate resources . . . educational exigency had to wait upon political expediency" (p. 45). The Morrill Act, which provided large land grants to the states in support of agricultural and mechanical education, paved the way for the transformation of the liberal arts college into the modern university, with its practical applications—and for the creation of university extension.

The first steps toward establishing university extension at the University of Wisconsin were taken in 1885, when the regents established the "short course" and the state legislature funded farmers' institutes (Curti & Carstensen, 1949, Vol. 1). As in the early English extension movement, these ventures were initiated outside the university. The university president and faculty did not initially offer support; yet, these efforts to extend education soon attracted national attention (Warner, 1888). In this period the tides of populism swelled and education offered opportunities for social betterment. The goal of extending education to the people—all the people—was a quite radical idea whose time had come.

Thomas Chamberlain, who assumed the presidency of the University in 1887, saw merit—unlike his predecessor—in the extension movement. Joining Chamberlain in championing extension were prominent faculty, including Frederick Jackson Turner, noted historian and disciple of Herbert Baxter Adams. Turner's essay "The Extension Work of the University of Wisconsin" (1893) offered a clear, if occasionally exaggerated, description of the vir-



Frederick Jackson Turner, professor of history at the University of Wisconsin from 1889 to 1910, did pioneer work in the extension movement at Wisconsin and in the history of the American West.

tues of extension: "There is in this machinery a means for exercising a most quickening and elevating influence upon the village life of the State, and for carrying irrigating streams of education into the arid regions" (p. 315). Extension was, for Turner, a way to enlighten the state's citizens "by discovering new truth, and rendering it available" (1893, p. 323).

Turner, one of the University's most popular extension lecturers, brought his theory of historical adaptation to the shaping of the Wisconsin extension movement (Billington, 1973) and his extension teaching helped shape his historical research. Turner's thesis on the end of the frontier in the American West was formulated largely while he taught extension courses on the history of the Northwest.

He brought his energy and vision to the organization of extension at the University of Wisconsin and served for a time as one of its foremost spokespersons—before the management of extension was delegated to administrators. Turner saw that the demands of extension drained faculty resources and might require

a special group of instructors, but he feared that this would create a second-class corps. Turner's fears were echoed nationally by G.H. Palmer (1892). Turner wisely foresaw the need to develop "more systematic, organized class-work" (1893, p. 324) and later recommended the administrative reorganization of the extension unit and the correspondence department. He saw correspondence study as a way to serve the state's citizens when regular faculty could not regularly travel the state's lecture circuit.

The success of the farmer's institutes led Chamberlain to support a series of mechanics institutes and ultimately the development of university extension in 1891. The faculty, under Turner's leadership in 1890, had laid out a plan for the creation of extension: participants' fees would cover course costs, and faculty would be compensated for their work, which was not to interfere with campus duties. Faculty also wished to organize correspondence courses, for which they would receive the entire fee. Chamberlain supported this plan to "establish a definite system of a comprehensive nature" (Curti & Carstensen, 1949, Vol. 1, p. 723). Yet the university provided no funds nor full-time administrators.

The 1891 University of Wisconsin catalog statement announced the beginning of the new venture in correspondence study:

By similar action of the Regents and Faculty, the American correspondence system of promoting advanced private study has been adopted and will be definitely formulated at the opening of the coming year. The correspondence system is inferior to the lecture and class system in that it lacks the personal supervision and inspiration which are so important factors in the best educations but has compensating merit of being adopted to a sparse population and to special students who cannot gather themselves into classes or audiences to receive lectures and personal instruction.

The scheme thus adopted is exceptionally comprehensive, embracing a combination of all leading lines of effort which have proved successful in extending to the people a portion of the benefits of University education. (cited in Allen and Wedemeyer, 1957, p. 20)

The program of extension lectures had no designated administrative structure. Local communities requested lecturers and the University responded. The university administration assumed that faculty and academic departments would similarly absorb correspondence study. The administration of the new program would fall to the president's office. When Chamberlain resigned in 1891, the new president, Charles K. Adams, noted in his first biennial report (1892-1894) the burdens that extension work placed on the faculty and the need for a "permanent secretaryship of the University extension movement" (cited in Allen and Wedemeyer, 1957, p. 22).

In 1894 Jerome H. Raymond was appointed secretary of University Extension, while serving as a professor of sociology. Raymond helped establish a series of correspondence courses, which were announced in 1896. Two years later, only 22 people had signed up for courses. By the time Raymond departed in 1899, faculty enthusiasm had waned, and the correspondence department—now under the control of the School of Education—was discontinued.

This early demise of correspondence study at the University of Wisconsin paralleled the general ebb in fortunes of the extension movement nationwide. Herbert Baxter Adams offered several reasons for the "fifteen lean years" (Creese, 1941, p. 49) of extension following the success of the early 1890s and preceding its revival in 1906: the lack of suitable extension lecturers and of financial support, the inability of university faculty to carry the extra burden of travel and teaching, new demands on campus instruction as enrollments increased, and the development of less expensive ways to provide popular education.

Yet the stage for revival had been set. The principles of extension and of correspondence study were firmly entrenched in Wisconsin and across the nation.

Revival and Reorganization. If William Rainey Harper "invented" collegiate correspondence study, its primary and perhaps most creative elaboration may be credited to two administrators at the

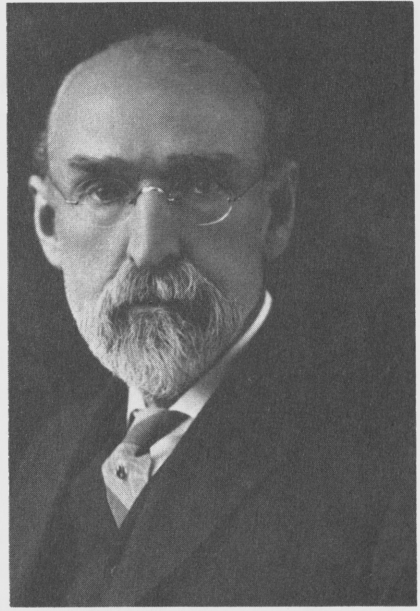
University of Wisconsin—William H. Lighty, secretary of correspondence study, and Louis E. Reber, director of University Extension. These men were supported by the University's president, Charles R. Van Hise, who had been an extension lecturer at the University of Chicago from 1892 to 1903 while on the Wisconsin faculty. Several events paved the way for their hiring.

The resurgence of correspondence study at the University of Wisconsin may ironically have been due in part to Governor Robert Lafollette's support of legislation that "prohibited promiscuous issuing of free passes for railroad travel" (Allen and Wedemeyer, 1957, p. 31). This legislation inadvertently denied University lecturers the means to reach their audiences.

Yet Turner and other faculty argued convincingly for reviving the lecture-correspondence work of the previous decade, commenting that "the University must make itself a positive force in the intellectual life of the state" (Rosentreter, 1957, p. 66).

At the same time, the success of commercial correspondence schools in soliciting students in Wisconsin prompted Van Hise to ask Charles McCarthy, the influential state legislative reference librarian, and John G.D. Mack, a University faculty member, to investigate the situation. McCarthy alleged that these proprietary schools enticed 35,000 Wisconsin residents to spend \$800,000 a year on their correspondence courses—money that might better be spent, he said, on university correspondence courses (Curti & Carstensen, 1949, Vol. 2).

In 1905 Van Hise requested \$250 from the Regents to study the problem and present Extension's response (Allen and Wedemeyer, 1957). The following year the University *Bulletin* listed two correspondence courses—in elementary mathematics and mechanical drawing—and in a parallel announcement in the University catalog asserted the advantages of correspondence instruction: individual contact with instructors, positive use of one's spare time, convenience of working at home—"giving the home a new

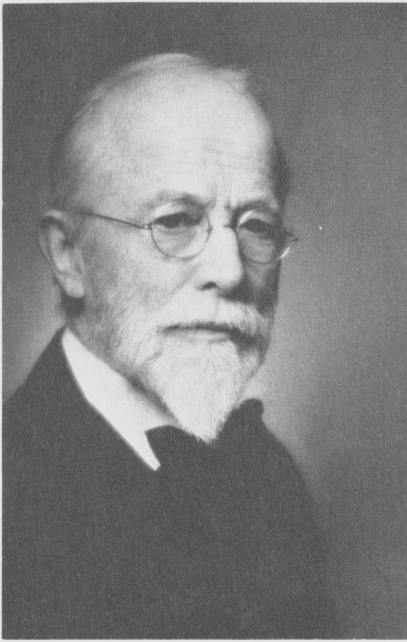


Charles R. Van Hise, president of the University of Wisconsin from 1903 to 1918, was determined to build a university that would both rank at the forefront of higher education in the United States and serve the people of Wisconsin. He reactivated and supported the university's correspondence study program.

influence and charm" (cited in Allen and Wedemeyer, p. 36)—and promotion of the virtues of self-reliance and self-determination.

In 1906 William Lighty, a St. Louis social worker, was hired to head the Correspondence Study Department. After "wheedling out of the faculty" (Axford, 1963, p. 58) commitments to teach through correspondence, Lighty announced 150 courses that fall. In 1907 Louis Reber—who had served as dean of the College of Engineering at Pennsylvania State College and was familiar with the work of the International Correspondence Schools in Scranton, Pennsylvania—assumed the new position of director of the University Extension Division.

For the next nineteen years these two men worked in tandem to advance the causes of correspondence study, extension, and the National University Extension Association. Lighty emphasized the development of "cultural" courses, while Reber's primary interest lay in vocational and professional education. Conflict developed between Lighty and Reber over what Lighty per-



William H. Lighty was the secretary of correspondence, and later director of extension teaching, at the University of Wisconsin from 1906 to 1937. Lighty helped build one of the nation's largest, most successful correspondence study programs.

ceived as Reber's "commercial" approach to correspondence study. Lincoln Steffens wrote of Reber, "He won away from his competitors, the private correspondence schools, their experienced agents. These came willingly, bringing their methods and students with them" (cited in Axford, 1963, p. 63). The two men clashed also on issues of standards but cooperated to create what was perhaps the most comprehensive university-based correspondence study program in the nation.

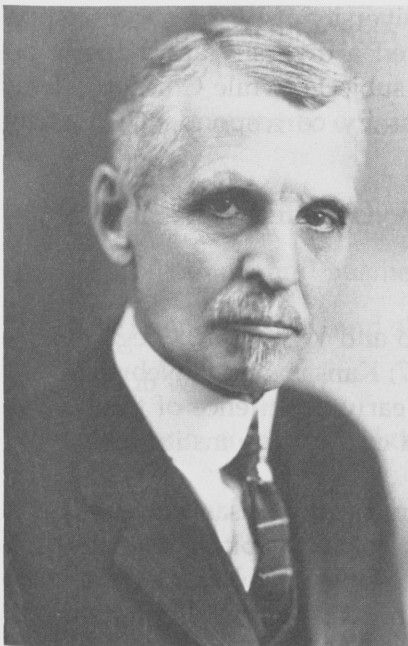
By 1908, there were 1,040 correspondence study registrations in courses offered by 35 departments at the University of Wisconsin (Axford, 1963). These figures are somewhat misleading, however, because it was Wisconsin's practice—as well as that of other institutions—to classify all off-campus extension enrollments as correspondence study students, even though some students actually participated in other kinds of classes.

Between 1906 and 1916 the Correspondence Study Department registered 24,555 students, including a growing number of

participants from industry. As new inventions and technological change demanded retraining of adults, Lighty saw the University "as having a dual role—that of helping the individual adjust to new change, and that of bringing about technological and cultural change" (Axford, 1963, p. 63).

By the second decade of the twentieth century, the University of Wisconsin was firmly entrenched as the nation's leader in extension and correspondence study. Although national luminaries such as Theodore Roosevelt exalted Wisconsin's exemplary service to the state, the state's politicians and other citizens still found much to criticize when University faculty ventured beyond the pale of campus instruction into research, extension, and public service (Curti & Carstensen, 1949, Vol. 2).

Despite the questioning of its role, the Wisconsin Correspondence Study Department continued to expand. By creating a separate instructional staff for vocational correspondence courses, Reber enhanced the department's options while preserving University departments' shared power over choice of instructors for



Louis E. Reber served as director, and later dean, of the University of Wisconsin Extension Division from 1907 to 1926. He was responsible for broadening the scope of university extension and creating an innovative vocational-training correspondence study program.

academic courses. Nearly half of the 1,200 enrollments in 1908 were in vocational courses (Curti & Carstensen, 1949, Vol. 2).

In addition to selecting instructors sensitive to students' varying backgrounds and levels of ability, Reber felt that many of the correspondence study subjects required special texts. These were to be written by experts in the field and revised by experienced teachers. From 1912 to 1919, the Correspondence Study Department published 32 texts with two different publishers. More than 288,604 copies of these texts were sold, bringing substantial royalties to the Department and authors. These texts broadened the audience for Wisconsin course materials and led to a tremendous increase in enrollments. For 1920 the enrollments in vocational courses totaled 33,659; for academic subjects 14,989 (Allen and Wedemeyer, 1957; Rosentreter, 1957).

The University of Wisconsin Correspondence Study Department had clearly established its presence. Its position was relatively secure in a university and state imbued with the idea of service to the people, in marked contrast to the University of Chicago with its emphasis on research, experimentation, and resident teaching. Additionally, the University of Wisconsin correspondence study program had achieved a diversity and balance between liberal arts and vocational subjects, while Chicago offered only traditional academic courses by correspondence (Gerrity, 1976).

The University of Kansas

Following the lead of Chicago and Wisconsin, Oregon began correspondence instruction in 1907; Kansas, Texas, Nebraska, and Minnesota followed in 1909. The early experience of the University of Kansas was perhaps typical of the other institutions.

During the 1890s the University of Kansas had tried, but failed, to establish an extension service. Despite the attempts of outstanding faculty such as Frank Blackmar to offer lecture study programs across the state, the Board of Regents, complaining that

the faculty was "overpaid and underworked" (Griffith, 1974, p. 246), enforced severe restrictions that virtually confined University faculty to the Lawrence campus. The widespread economic depression and doubling of student body size, as well as the public's declining interest in "nonvocational," impractical courses, also contributed to a reduced interest in extension courses (Griffith, 1974). When the restrictions on teaching and shortage of committed faculty members hampered the growth of the lecture-study program, correspondence courses were initiated.

Kansas, like other universities, was heavily influenced by the Wisconsin approach to correspondence study. The University of Wisconsin loaned the University of Kansas course assignments, which were used as models in some cases and, in others, were adopted without change (Stockton, 1951).

Administrators and faculty who organized the Kansas program believed that the courses would appeal to several types of people:

1. students preparing for college work;
2. students needing high school completion as the prerequisite to careers;
3. college students whose resident study had been interrupted;
4. teachers in public schools;
5. professional and business men;
6. farmers, artisans, and shop workers;
7. club women; and
8. anyone anxious to keep intellectually alert (Stockton, 1951).

In the 1909 *Bulletin* 22 academic departments listed 87 courses. Enrollments in the University of Kansas correspondence study program expanded from 57 students in the first year of the program

to more than 1,000 by 1916–1917 and to 2,000 five years later (Griffith, 1974).

Two of every three enrollments were for university credit; most of the remainder were for high school completion. Competition from proprietary schools may have kept noncredit enrollments at an insignificant level. Enrollment statistics indicate that most students used the Kansas correspondence courses to meet undergraduate general education requirements. The most popular courses were in English, education, economics, romance language and mathematics. The rise in enrollments in education courses following World War I reflected strong pressures to upgrade teacher training (Wilson, 1985). Unlike Wisconsin, where some faculty were assigned solely to correspondence work, the University of Kansas faculty received no additional compensation for their correspondence instruction. Thus, the Correspondence Study Department was forced to hire part-time instructors. One newspaper reporter observed that the one thing holding correspondence study back was “the inadequate financial provision made by the legislature” (cited in Wilson, 1985, p. 29). Although Minnesota appropriated \$80,000 in 1910 for university extension for a two-year period and the Wisconsin legislature voted \$300,000 for extension, the University of Kansas in the same period received no separate appropriation for the extension department, forcing it to draw from the University’s general fund.

Clearly Kansas was not Wisconsin. Although the “Wisconsin Idea” of service to the state had prompted a Kansas delegation—which included the governor, chancellor, and prominent journalist William Allen White—to visit Madison, primarily to observe the Wisconsin extension operation, Kansans were “less enthusiastic about their university than Wisconsinites, and they gave it less money” (Griffith, 1974, p. 256). By 1912, hope that the University of Kansas would become the Wisconsin of the Southwest had vanished. Confusion about the proper role of the University in affairs of the state and about the place of extension in the University structure, new emphasis on educational efficiency (Callahan, 1962), and concern over duplication of programs led to both internal and external criticism of University of Kansas extension ac-

tivities. Chancellor Frank Strong voiced a new caution: "to push this work too far, to extend its lines too greatly, brings powerful and destructive opposition. An institution must, therefore, be as wise as possible and do its duty as frankly and conservatively as possible" (cited in Griffith, 1974, p. 262).

Another new service to the state began, however, at this time—one that would survive, prosper, and transform extension work across the nation: the preparation of individuals to enter the various professions. At the same time correspondence study educators began to achieve a professional identity.

Correspondence Study Achieves an Identity of Its Own

With the spectacular growth in enrollments in some correspondence study programs and the firm entrenchment of extension in state university systems, correspondence educators began to carve a pedagogical niche for themselves and to create a professional home. The broadening program focus, search for universal guidelines, and recognition of the need to train correspondence administrators led to the creation of a professional organization, the National University Extension Association (NUEA), that would serve as a forum for program administrators to discuss common issues (Eklund, 1976).

The creation of the NUEA was also, in part, a response to the tarnished image of the proprietary schools and diploma mills (Gerrity, 1976). It was a significant step in the search for respectability.

At the first meeting of the NUEA in Madison in 1915, Van Hise gave the keynote address, emphasizing the importance of the correspondence method in "work of college grade" and the vast opportunities for vocational instruction (Van Hise, 1916). Reber and Lighty also played central roles in developing the program. In a report prepared for the federal government at the same

time, Reber (1914) noted that 28 institutions had organized university extension activities (by 1919 this number would grow to 73 and by 1929 to 149 [Klein, 1920; Bittner & Mallory, 1933]). By 1913 most of these institutions had established extension departments. Twenty-two of the 28 institutions with extension units were represented at the Madison meeting.

Universal issues including course completion problems, program promotion tactics, university policies regarding acceptance of credit for correspondence courses, credit transferral, and standards of quality occupied correspondence educators at these early NUEA meetings. Underlying all of these concerns was the larger issue of how to achieve and preserve the legitimacy and respectability of their programs.

In a presentation at the second NUEA national conference, Mallory (1916) gingerly addressed the promotion issue: "the inch announcement that 'in connection with resident work the University of Chicago offers also instruction by correspondence' which appears now and then in a few periodicals can only by courtesy be called promotion" (p. 43). Although Mary Orvis of Indiana University's Extension Division also recognized the dilemma of the extension educator regarding course promotion, she took issue with the insipid advertising of many correspondence study programs. In a U.S. government publication *The Application of Commercial Advertising Methods to University Extension* (1919), she commented, "the extension division director is between two fires in the matter of publicity and advertising. The general public criticizes him for not advertising his courses more widely, and the faculty criticizes him for alleged offenses against their ideas of academic dignity" (p. 7). She advocated drawing on the "scientific knowledge" gathered by psychology and commerce professors and on journalists' training to reach the public more effectively. She also recommended making university catalogs, described as a "forbidding academic mystery" (Hall-Quest, 1926, p. 272), more accessible, and suggested using assertive language and appealing layout to create sophisticated advertising campaigns.

Some advertising, such as that of Columbia University, which was engineered by a newsman, aroused the ire of ivory-tower academics such as Thorstein Veblen (1918) and Abraham Flexner (1968). Flexner noted that Columbia's Home Study Department offered "instruction of university grade" to all comers—"a thing which the University itself on the campus does not attempt" (p. 138). He objected to the "feverish atmosphere of a university which draws no distinctions, sets up no criteria, and engages in every miscellaneous activity" (p. 144). Flexner's criticisms, which were made in 1930, may have influenced the University of Chicago faculty survey (1933) that sounded an early warning of the demise of that university's correspondence study program. The survey's report commented that the position of the University of Chicago had changed from that of a "leader and a breaker of new educational ground" to "being merely one of a large number of institutions conducting correspondence study" (p. 17). The survey findings suggested that correspondence study should be justified on an experimental basis, generating innovations and research data leading to improvements in teaching methodology (Gerrity, 1976), rather than providing "hack-work" that supported faculty supplemental income.

In an effort to enhance their respectability, correspondence practitioners assiduously drew distinctions between their programs and those of proprietary schools, while establishing standards for their emerging profession. At the University of Wisconsin, Louis Reber attempted to counter a high dropout rate by adding a new dimension to the Correspondence Study Department's utilitarian courses. He provided itinerant instructors who would meet classes of correspondence students at intervals. In one Milwaukee industrial education program, manufacturers provided classroom space, gave employees release time to attend classes, and in some cases paid enrollment fees (Curti & Carstensen, 1949, Vol. 2).

In another innovative, exemplary program, Johns Hopkins University trained professionals in several health-care fields, at the request of the American Medical Association, in the use of vital statistics (Bittner & Mallory, 1933).

Model programs such as these brought support from the business community, as well as significant revenues, and justified the courses in terms of "money value." And unlike their university-level counterparts, these utilitarian noncredit courses were not bedeviled by the issue of credit.

Although correspondence credit courses typically covered the same material as resident courses, most institutions allowed only a portion of the course work toward a degree to be taken by correspondence—typically, no more than 50%. As Gerrity (1976) commented, the principle of the minimum residency requirement has led to "philosophical and practical problems" for nonresident students of higher education since the dawn of correspondence instruction in the United States. "The question of how much credit (if any) to grant within an institution for correspondence study and the question of credit by outside institutions or professional societies have been thorny and persistent. These questions ultimately strike at the very integrity of the correspondence instruction concept" (p. 63).

Recommendations of the NUEA Committee on Standardization (1924), which resulted from a comprehensive survey of extension credit courses offered by American universities, were designed to underscore the integral mission of correspondence instruction in university programs. Course content was to be equivalent to that of resident courses, only students who could "pursue the course with profit" (NUEA Committee on Standardization, 1924, p. 64) were to be admitted, instructors were to be members of regular university faculties, and students who successfully completed extension courses should receive the same amount of credit as resident students.

The inclination of institutions to limit the number of correspondence credits that might be applied toward a degree varied—typically from a high of 50% to a low of 25% of total credits. Two tendencies were reflected: a determination of resident academicians to "tighten standards" by restricting acceptance of correspondence credits and a determination of extension administrators and instructors to force students' higher performance stan-

dards "in order to erect a barrier of high quality against the threats of further limitations" (Bittner & Mallory, 1933, p. 116).

Although these issues of standards and credit continued to be of central concern in the formative years of correspondence study, early NUEA members had advanced far beyond the Illinois Wesleyan faculty of the 1870s, who viewed this instruction as an occasional supplement to campus instruction.

The Advent of Instructional Technology

Visual instruction, including lantern slides and motion pictures was added to the repertory of many extension units in the period 1910–1920, but the most promising new technology for correspondence instruction appeared to be instructional radio. In the years between the world wars, the federal government granted radio broadcasting licenses to 202 colleges, universities, proprietary schools, and school boards (Pittman, 1986). During this period 13 institutions offered instructional radio courses, making formal educational experiences available to nonresident, enrolled students.

The size of the American radio audience was estimated at more than thirty million by the 1930s, causing some educators to believe that radio would "radically transform American higher education (Pittman, 1986). The University of Iowa's 1927 request to the Federal Radio Commission for greater authorized power stated:

This is no place to indulge in idle fancies but it is no imaginary dream to picture the school of tomorrow as an entirely different institution from that of today, because of the use of radio in teaching. (cited in Pittman, 1986, p. 40)

Yet, despite the great hopes for instructional radio, by 1940 there was only one college-level credit course offered by radio—and that failed to attract any enrollments (Atkinson, 1941).

The experience of the University of Iowa in this period illustrates both the promise and the pitfalls of early instructional radio, and to some extent, presages current problems in instructional technology as it is used in distance education. Iowa had begun campus broadcasting activities in 1911, before radio stations were licensed. In his dedication address for the opening broadcast of the federally licensed station WHAA (later WSUI) in 1925, President Walter A. Jessup gloried in the improvements brought by this technological revolution, striking a cord in listeners who had witnessed the "entire period of the transition from the pony express to that of the aerial mail service; who have watched the transition from the courier . . . to the telephone and now, the radio" (cited in Pittman, 1986, p. 46).

The University Extension Division controlled the station, which was managed by Carl Menzer, an alumnus of Iowa and owner of a small radio station (Atkinson, 1941). For spring semester 1925 the Bureau of Correspondence Study announced five radio courses in commerce, sociology, education, English, and political science. These courses were advertised by direct mail, announcement cards distributed on campus, and posters (Pittman, 1986). Eighty students enrolled, 64 of whom completed the courses and received credit.

Although this experiment was pronounced a success, problems immediately abounded. Conflicting demands for the assigned frequency had caused changes in scheduling; increased paperwork in administering these courses made attending to traditional courses difficult. Jessup received complaints about the station's "boring, lackluster programming" (Pittman, 1986, p. 41), and expenses mounted. Although seven courses were announced for fall 1925 and 87 students enrolled, enthusiasm for the University of Iowa radio courses had peaked. In 1927, only 14 students enrolled in two courses—and none in a third. No courses were offered in 1928.

What accounts for this failure of early instructional radio at the University of Iowa? Helen Williams, director of the Bureau of Correspondence Study, later suggested several reasons:



Carl Menzer, director and announcer for University of Iowa radio station WHAA (later WSUI). In the early years of educational radio, its supporters insisted that this invention would revolutionize instruction.

As time went on and neighboring stations increased their power, it became difficult for any but those in this section of the state to “get” our station. Then, too, the novelty had worn off, and the instructors objected to the extra work for so little pay. (cited in Atkinson, 1941, p. 63)

During this period commercial competition, including Iowa entrepreneurs, seized the air waves to tout their products. For example, Shenandoah nurserymen Earl May and Henry Field, who each had his own station, mixed news, music, and religious services with talks about agriculture and horticulture (Stern & Stern, 1991). On clear nights they jacked up the power far beyond their assigned 500-watt limit and bounced “their signals around the globe.” They would “pour on the kilowatts and really tear a hole in the Midwest” (cited in Stern & Stern, 1991, p. 81). The University of Iowa couldn’t compete with such tactics.

By 1931 WSUI had a range of only 100 miles, had changed its frequency and broadcast power six times, and shared scheduling time with three other stations. As Pittman (1986) commented, this confusion benefited neither students nor prospective students. On a national level, the NUEA adopted a resolution in 1931 attributing the unsatisfactory situation of radio education to the "persistent efforts of commercial interests to dominate and control" broadcasting (cited in McMahan, 1976, p. 14). Pittman (1986) attributed this failure of the Iowa radio courses to a lack of planning, of needs assessment, and of faculty and audience identification.

Early attempts at offering college credit via radio were, however, an important precedent in the development of educational television at midcentury. The radio programs were a "helpful supplement" to correspondence courses; they lent a personal touch to the instruction; and they built up an "extended consciousness" of the university's educational function (Atkinson, 1941, pp. 73–74). Distance educators who must regularly assess the merits of new media today can learn several lessons from the experiences of early instructional radio, including a wariness of media hype and of public antipathy toward instructional programming.

Depression and War

By 1933, according to Bittner & Mallory, the "principles and methods of tuition by mail [had] been accepted widely" (p. 28). Packing companies, railroads, the American Banking Association, labor unions, the United States Army and Navy, and state and national welfare associations recognized the merits of correspondence instruction.

Some of the most interesting experiments in correspondence education in the 1930s were responses to the economic conditions of the Great Depression. Many high school graduates who could not afford to do resident work at a university were able to earn college credits through modified correspondence study. Such programs were typically funded by local school districts, the Works

Progress Administration (WPA), or the Civilian Conservation Corps (CCC). When enrollments, state funding, and revenues declined severely, the infusion of federal money and support of local school districts enabled correspondence study programs to survive, gain credibility, and offer innovative programs. The hard times of the 1930s offered correspondence educators the chance to earn legitimacy and respectability; many seized the opportunity and redoubled their efforts.

At the University of Kansas, for example, a new extension unit, Emergency Extension Classes, was organized in 1933 to offer freshman and sophomore courses, using correspondence study material, under the direction of local instructors and financed by local school systems (Stockton, 1963). Correspondence courses were also offered in CCC camps in 1935–1937 and to WPA clients in 1937–41. The success of similar programs across the nation contributed to the expanded interest in establishing state systems of junior colleges (Rosentreter, 1957).

The University of Nebraska established supervised correspondence study in 1930, primarily to supplement the limited curricula of rural Nebraska high schools. Knute O. Broady, director of the Nebraska's correspondence study program, described supervised correspondence study as "standing halfway" between traditional correspondence instruction and "individualized instruction carried on by the regular instructor" (cited in McMahon, 1976, p. 14). NUEA delegates intensely debated the wisdom of offering correspondence courses below the university level, although a 1933 national conference resolution "expressed interest" in the Nebraska program.

Although correspondence educators responded imaginatively to the crises of the Depression, their funding levels decreased drastically—some as much as 40% (Willey, 1937; Wilson, 1985)—and extension activities were curtailed even more than academic departments. Instructors who had earlier been compensated for their correspondence instruction were now expected to assume these duties for no additional pay. During this period many extension units were forced to become more self-supporting as state funding shriveled.

Flexibility characterized the response of correspondence study programs to wartime conditions, as well as to economic depression. Although William Lighty's attempts at organizing an integrated study program for army camps in World War I had met first with hesitancy and then opposition (Rosentreter, 1957), the Wisconsin legislature now authorized and financed correspondence courses for military personnel, as the United States prepared for escalating prospects of war in the pre-Pearl Harbor period.

In May 1941, Lieutenant Colonel William R. Young, the supervisor of correspondence instruction at Penn State, was granted a leave of absence from Penn State when he was recalled to active duty, becoming the Army's first education officer in World War II. In Washington, Colonel Young conducted a staff study of the Army's educational program and drafted recommendations that led to the establishment of the Army Institute at Madison, Wisconsin on March 27, 1942 (Penn State Archives, The William Young Collection). Later, this program was expanded to include all branches of the military and was renamed the United States Armed Forces Institute (USAFI). William Young served as USAFI's first commandant before leaving for Australia in 1944 to establish the Pacific branch of the nascent military correspondence education program under the command of General Douglas MacArthur. For his work in the Pacific, MacArthur awarded Young the Legion of Merit (Penn State Archives, The William Young Collection).²

From 1942 until it closed in 1974, USAFI enrolled more than seven million servicemen and -women in thousands of high school courses. The program recorded 261,222 enrollments at the university level (Sheats & Smith, 1967). Familiarly known as "Fox-hole University," USAFI was the largest adult education program in the world during the 1950s (Penn State Archives, The William Young collection). At the height of the program, Madison, which served as its administrative home, had approximately 120,00 stu-

²I am grateful to Stephen J. Wright for providing this material on the United States Armed Forces Institute.

dents with 350,000 enrollments (Rose, 1985). Throughout its 32-year existence, USAFI was closely associated with the University of Wisconsin, Extension correspondence study program. Charles Wedemeyer realized the opportunity afforded the university's program by the concentration, in Madison, of a large number of dedicated and experienced correspondence study specialists in many academic fields. The Wisconsin and USAFI programs had a mutually beneficial symbiotic relationship. The staffs of the two programs were bound together in a quid pro quo affecting the mutual success and survival of the programs. Ripley Sims, head of the USAFI Instructional Division, was an active member of the strong group of correspondence study leaders emerging in NUEA during the 1950s (C. A. Wedemeyer, letter to Borje Holmberg, June 25, 1984).

Challenged by the enormous project taking form, Wedemeyer began to search for answers to questions never before asked about the nature of correspondence study—questions for example, about instructional characteristics, learner characteristics, and student needs. From the pursuit of answers to these questions emerged needed research initiatives such as Gayle Childs' (1949) dissertation studying the effectiveness and reliability of correspondence study as an educational method. From these modest beginnings, a body of information began to accumulate that helped students and faculty improve the quality and effectiveness of correspondence study programs across the nation (C. A. Wedemeyer, letter to Borje Holmberg, June 25, 1984).

Even though USAFI could not grant credit for its courses, it could recommend that credit be awarded. This frequently proved difficult for students when they discovered that to earn credit, they must pass a comprehensive test covering the course material (R. Sims, personal communication to Sylvia Rose, August 1983). Because of this and other logistical problems, course completion rates were very low, dropping to 14% in the last years of the program (F. Johnson, personal communication to Sylvia Rose, May 1983). Despite such problems, USAFI enjoyed many successes and played a pivotal role in the resurgence of university independent study throughout the 1950s.

In response to wartime needs, extension programs also provided a variety of technical and mechanical training opportunities, as well as short courses and refresher courses. In addition, they offered radio programs and public forums on war-related subjects. The contributions of extension and higher education in general were instrumental in creating the GI Bill of Rights in 1944 and the influential report of President Truman's Commission on Higher Education in 1947, which expanded the horizons of higher education in the United States.

The Great Depression and World War II meant great challenges and changes for correspondence study programs across the nation. These were only a prelude for what lay ahead. The post-war years would be filled with striving, idealism, readjustment—and more challenges. Although correspondence study had—like the rest of higher education—experienced economic difficulties during the Depression and chaotic programming in World War II, it emerged from these periods of abnormality not weakened in spirit, but stronger than ever. Practitioners in this field were ready to experiment with new programs and technologies that promised to improve instruction and to grapple with new circumstances.

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Chapter 2

Opportunity Lost, Opportunity Regained: University Independent Study in the Modern Era

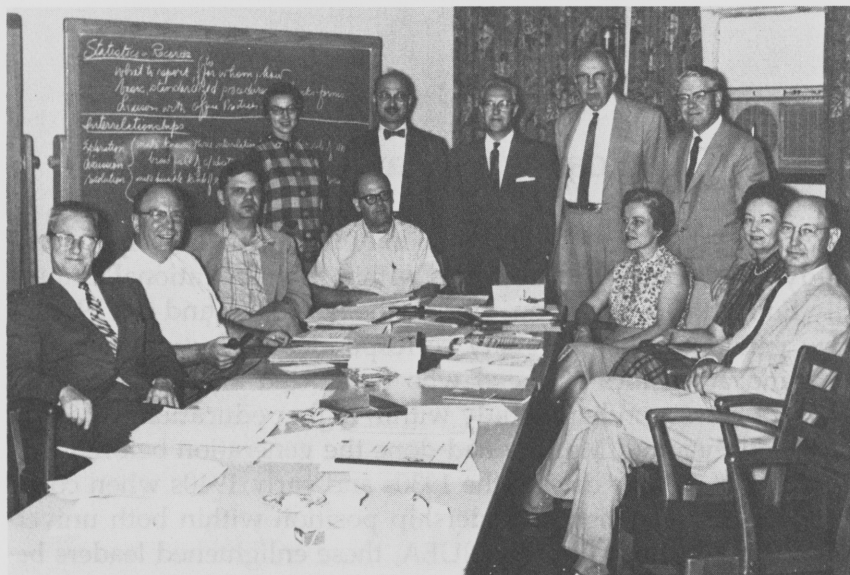
Stephen J. Wright

The Post-war Years, 1945–1960

The post-World War II evolution of university correspondence study is reflected in its activities within the the National University Education Association. During the late 1940s and the 1950s, a new generation of university correspondence study administrators and academics emerged who revitalized and advanced the place of correspondence study within higher education as Lighty, Reber, Bittner, and Mallory had done the generation before. After a period of decline during the 1930s and early 1940s when correspondence study lost its leadership position within both university extension units and the NUEA, these enlightened leaders began rebuilding the status of learning through the correspondence study method. Included in this group were Charles Wedemeyer of the University of Wisconsin, Extension; Gayle Childs and Knute Broady of the University of Nebraska; Alice Rowbotham at the University of California, Berkeley; John Davies of the State Uni-

versity of Iowa; Neil Garvey from the University of Illinois; William Young of the Pennsylvania State College; Mary Lou McPartlin, Loyola University, Chicago; Ripley Sims of USAFI; Vassar Bishop of the University of Mississippi; Leonard Stein of the University of Chicago; Lloyd Hansen from Minnesota; Norinne Tempest from the University of Utah; and Elizabeth Powell of the University of Georgia (NUEA, 1952–1955).

A number of significant events in university correspondence study occurred during the fifteen years after the war that formed the foundation for the renaissance which raised the movement to new heights in the 1960s and early 1970s. The highlights of this period include the rebuilding of programs, the convening of the second International Conference on Correspondence Education (ICCE) hosted by the University of Nebraska in October 1948 and the fourth International Conference at Penn State in August 1953; the development of a correspondence study newsletter beginning



NUEA Correspondence Study Division Administrative and Planning Committee meeting at the State University of Iowa, September 13–16, 1959. Left to right: Oscar Spencer; Charles Wedemeyer; Donald McCoy; Sylvia Carter; Arthur Krival, seated; Leonard Stein; John Davies, chair; Neil Garvey; Lloyd Hansen; Elizabeth Powell; Norinne Tempest; Gayle Childs.

in the early 1950s; the creation of the Correspondence Study Division of NUEA in 1955; and the active exploration by correspondence study leaders of the use of television as a technology to support, supplement, and enhance the correspondence study method.

The state of the field in the immediate post-war years was precarious. Gayle Childs (1973) observed that correspondence study "was *the* nontraditional form of instruction throughout the first half of the twentieth century. It was new, it was innovative. It was at the frontier. . . . It was the Open University, the University Without Walls, the Empire State College of its day" (p. 3). And, as is typical of novel or revolutionary concepts, correspondence study in the 1940s and early 1950s struggled to gain acceptance. Only a few outspoken practitioners at a handful of institutions served as advocates for the methodology. Resources were meager, staffs were small and usually lacking in academic credibility. Despite the efforts of leaders in the field decades earlier, correspondence study was still seen as suspect by academics. In the public mind, the exploitation of the methodology by the commercial correspondence schools transferred to the university-based programs. With few exceptions, deans and directors of extension were not comfortable with the "offbeat" process of correspondence study (Childs, 1973).

In the late 1940s many correspondence study programs were led by personnel who bore the title "Correspondence Study Secretary." Extension deans and faculty believed that correspondence study programs could be administered by clerical personnel (Childs, 1973). Elizabeth "Betsy" Powell, director of the University of Georgia's correspondence study program from 1947 to 1979, described the dismal state of the profession in her early years at Georgia: Most people who entered the field after the war were secretaries who were promoted into positions as the head of correspondence study. Courses lacked packaging and structure. Students were sent individual lessons in an envelope and received additional lessons only when they completed the initial ones sent to them. The concept of a structured course or study guide did not exist. Powell believed that the policies and procedures at Geor-

gia were similar to those at other university correspondence study programs. She cited John Davies, head of the correspondence study program at Iowa, as experiencing similar problems of low status, morale, and financial support (Pittman, 1991; Powell, 1987). When Alice Rowbotham assumed control of the University of California, Extension correspondence study program in 1942, she found a staff of five clerical employees running the program. The half-time chairman who had died a number of years before had not been replaced. Rowbotham, who lacked an academic degree, carried the title "Specialist in Correspondence Study" (Rowbotham, 1988). Plainly, the correspondence study program at Berkeley was at low ebb in 1942. Its low status, like that of Powell's Georgia program, was the norm during these years.

The status of university correspondence study had fallen from its previous position as the cornerstone on which university extension units had been built early in the century. According to Childs, the average level of education and experience required for administrators in Conferences and Institutes was higher than for comparable positions in Correspondence Study. Salary levels were always higher for extension directors in areas other than correspondence study (Childs, 1973). This lack of administrative commitment to correspondence study as a viable educational methodology is in part related to the dominant role of women in the field. As Powell noted, when extension directors promoted their secretaries to directors of correspondence study, women got a leg up in the business. Likewise, most correspondence study faculty at this time were women and all of the women in NUEA were in the correspondence study area (Pittman, 1991). This was an era when few opportunities existed for women in the professional staff and faculty ranks at most major U.S. universities. Because correspondence study was not seen as important, many women were provided with leadership opportunities that did not exist elsewhere in higher education at this time. The typical correspondence study "shop" in the immediate post-war years was staffed primarily by clerical personnel, with poorly paid professional staff lacking the accepted academic credentials. Course study guides were typically not standardized. Little research existed to support the apparent and perceived strengths of the meth-

odology, and there was little or no sense of professionalism (Childs, 1973). Today's programs trace their heritage to this inauspicious base.

Correspondence instruction received a major boost in the United States when the University of Nebraska hosted the second International Conference on Correspondence Education (ICCE) in October 1948. Conference participants included the leading members of the American correspondence study movement of the time—Knut Broady, Gayle Childs, and Fred Wilhelms of Nebraska; J.S. Noffsinger of the National Home Study Council; T. W. Thordarson of North Dakota; Neil Garvey of Illinois; Rex Haight of Montana; William Young of Penn State; and Earl Platt of Missouri (ICCE Proceeding, 1949). More than 115 representatives attended from Canada, Norway, New Zealand, the Philippines, and the United States. Of the 100 U.S. delegates, 56 were women, providing another indication of the major role played by women in the movement (ICCE Proceedings, 1949). Panels and presentations addressed topics on "The Instructional Staff of the Correspondence School," "Armed Services Courses: Their Implications for Adult Education," "Supervised Correspondence Study in Nebraska," Correspondence Instruction and its Relationship to Over-all Curriculum Planning," and Guidance in Relationship to Correspondence Instruction" (ICCE Proceedings, 1949). The conference, dominated by delegates from U.S. institutions, achieved at least two major objectives: it revitalized the nascent international correspondence education movement, and it established U.S. correspondence educators as the leaders of this movement. The fourth ICCE meeting hosted by William Young at Penn State in August 1953 addressed topics on the preparation of correspondence study course materials, methods of instruction, labor and trade education, and correspondence study administration. These two conferences advanced the status and reputation of correspondence education within U.S. universities.

By 1957 when the ICCE convened its fifth conference in Banff, Alberta, Canada, delegates from five nations were in attendance, with individuals from universities, secondary schools, primary schools, proprietary and governmental institutions reflecting a

growing interest in research in correspondence study. Of the 26 delegates from U.S. university correspondence study programs, 16 were women (NUEA, 1957, July). Drawing on themes introduced at the Penn State ICCE conference, focus was placed on defining terms in the field, developing systematic procedures for the production of correspondence study materials, encouraging comparative studies of the success of the method, and sharing information and experience throughout the world. Participants recognized correspondence study as a field with a unique mission (Wedemeyer, 1984).

The investigative spirit of the leaders of the Correspondence Study Committee (CSC) of the NUEA in the early 1950s began to initiate momentum. On May 21, 1952, the NUEA Correspondence Study Committee, chaired by Neil F. Garvey of the University of Illinois, published the first newsletter devoted to correspondence study activities within the national association (NUEA, 1952). Entitled simply *Correspondence Study*, the initial issue offered articles on the recent NUEA national conference program, developments in the field of correspondence education, status reports from the directors of individual correspondence study programs, and updates on the issues of the day affecting the field such as the legislation regarding the use of veterans' benefits by Korean war veterans to pay for correspondence courses (NUEA, 1952, 1953).

A 1954 edition of the newsletter reveals a topic of prime concern. In a report by the subcommittee on relations between the NUEA and proprietary schools, Chairman William Young of Penn State recommended that the CSC of NUEA not meet with the National Home Study Council (NHSC) to discuss common problems. The CSC was concerned that official recognition of the NHSC, resulting from an agreement to meet with them, might imply accreditation status for that organization. Young's recommendation was accepted and the committee disbanded with the understanding that no further association with the proprietary schools would be considered at that time (NUEA, 1954).

The place of correspondence study within the NUEA in the early 1950s is reflected in a statement attributed to the 1952-53

NUEA president, J.W. Brouillette: "It is my belief that the Correspondence Study Committee is one of the strongest committees of the Association" (NUEA, 1952, October, p. 1). The Correspondence Study Committee voted to rotate the responsibility for publishing the newsletter among member institutions annually with the University of Kansas assuming responsibility for the first year, 1952-53 (NUEA, 1952).

At its 1955 national conference at Penn State, NUEA created new divisions to facilitate professional development with the various units of the association. Correspondence study attained divisional status, recognizing its high professional standing within the association (NUEA, 1955).

This acceptance was accelerated through the efforts of the newly formed division to explore the application of television technology to correspondence study. In 1956 the division conducted a comprehensive survey of the use of television to support correspondence instruction. The survey report called for research to measure the effectiveness of television as an educational tool. Charles Wedemeyer and Gayle Childs, along with other division leaders, believed that instructional television (ITV) met the essential professional requirements for a normal teaching-learning experience when correspondence study was added to television instruction to provide feedback to students (NUEA, 1957, July). With a \$365,000 Ford Foundation grant, Childs initiated a project in 1956 to study applications of TV instruction in combination with correspondence study. From this study, Childs concluded "televised instruction is not a method. Television is an instrument by means of which instruction can be transmitted from one place to another" (Almeda, 1988, p. 73). Childs also found no appreciable difference in the level of achievement of students taught in regular classrooms by means of television, or by a combination of correspondence study and television (Almeda, 1988).

In the mid-1950s, 17 NUEA correspondence study departments used television in their instructional programs. A premise behind the use of television was that traditional correspondence study methodology would provide feedback to students. Instruc-

tion by television at this time was growing in traditional resident instruction environments using both open and closed circuit TV and the projection of kinescopes (NUEA, 1957, July). In 1956, the University of Wisconsin published a catalog in which it listed 85 kinescopes available for rental. Most of these had been specially prepared for use in correspondence study television courses (NUEA, 1956, February). Although ITV would never realize the educational goals initially projected for the medium, the Independent Study Division was a recognized leader in exploring applications of television to instruction.

As the 1950s drew to a close, university correspondence study was positioned to participate in the innovative movements that would sweep through many branches of higher education in the decade and a half to follow. More than 60 universities that were NUEA members had correspondence study programs. In 1958–59, 45 colleges and universities reported total correspondence study enrollments of 160,788. Of these, 98,696 were in college-level courses; 55,461 were in high school courses; and 6,631 were in noncredit courses (Wedemeyer and Childs, 1961).

Comparative studies had shown the effectiveness of correspondence study. Practitioners had produced studies investigating noncompletions, individuals like Gayle Childs at Nebraska had begun to investigate the uses of television in the correspondence field, and those working in correspondence study began to feel a true sense of profession. Staff and faculty involved in the movement believed they were working with a rather radical idea, a unique phenomenon that deserved expansion and further investigation through scholarly study and experimentation.

Looking back to the 1950s, Gayle Childs (1973) wondered whether those who entered the field in the 1940s and 1950s might not have done more to advance correspondence study's standing in higher education. Childs once again predicted what lay ahead for nontraditional educational methods when he said, "Individuals and groups are increasingly approaching our campuses to ask what we can do to meet their educational needs which cannot be

met by daytime classroom instruction" (Childs, 1957, p. 7). Correspondence study would indeed be one of the answers to these needs in the coming decades.

The Renaissance Years, 1960–1975

During the 1960s and 1970s a number of alternatives to traditional higher education emerged in the United States. These nontraditional educational options resulted, in part, from broad national trends that included rapidly escalating costs of traditional resident education; a renewed interest in informal, nontraditional education; an increasingly mobile American population; the growth of career-oriented college curricula; the heightened acceptance of testing and evaluation organizations; public dissatisfaction with educational institutions in general; the influence of "agencies of accountability" such as the Carnegie Commission on Higher Education; and the early success of Britain's Open University (Gerrity, 1976). These trends and the programs that they spawned had an immediate and positive effect on university correspondence study.

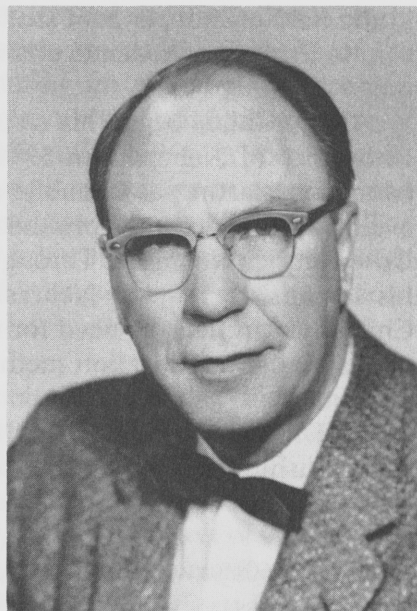
The role of organizations such as the College Entrance Examination Board (CEEB) and Educational Testing Services (ETS) in assessing learning through nontraditional modes of study paved the way for the creation of entities such as the University Without Walls, a number of special degree programs, external degree programs, and imitations of the British Open University. A major catalyst in the promotion of new higher education programs was the Carnegie Commission on Higher Education, established in 1967. In its first five years of existence, 1967–1972, the Commission received \$5,567,000 in grants from the Carnegie Corporation. A large percentage of these monies funded innovative, nontraditional projects and programs (Gerrity, 1976).

Foremost among these nontraditional programs were several American variations of the British Open University, which through heavy use of correspondence study sought to make higher education degrees more accessible to students unable to attend tradi-

tional, campus-based courses and programs. The first U.S. open university was New York State's Empire State College, which commenced operations in 1971 (Gerrity, 1976). The Bachelor of Liberal Studies program initiated by the University of Oklahoma in 1960 was another example of nontraditional educational forms that emerged during the period. Both Goddard College and Syracuse University experimented with "special degree programs" designed to meet the needs of adult learners. These programs modified the concept of academic credits and provided a greater flexibility regarding degree requirements and time limitations than was characteristic of tradition-bound degree programs (Gerrity, 1976).

Another radically new program to emerge during this era was the external degree. The Regents External Degree Program of the State of New York, founded in 1970, and the Thomas A. Edison College in Trenton, New Jersey, created in 1972, were prominent leaders among external degree-granting institutions. Both were premised on the notion of enrolling students in what were essentially academic clearinghouses or broker institutions to assist them in designing academic degrees from credits earned through a variety of traditional and nontraditional mechanisms including experiential learning, university correspondence study, CLEP exams, USAFI standardized exams, and traditional resident instruction. Intensive counseling services helped students design recognized, high-quality academic programs of study leading to associate and baccalaureate degrees. Correspondence study, one of the most nontraditional teaching methodologies, gained in popularity as a result of the proliferation of these alternative programs that became an accepted dimension of higher education in the 1960s and 1970s.

Of the individuals who helped to transform correspondence study into a profession, two stand above all others as the dominant leaders of the movement during the 1950s, 1960s, and 1970s. They are Charles Wedemeyer of the University of Wisconsin and Gayle Childs of the University of Nebraska. Both made enormous contributions through their leadership at their respective institutions and within a range of national and international professional organizations, principally the Correspondence Study Division of



Charles Wedemeyer, director of Correspondence Study at the University of Wisconsin from 1954 to 1964 and later director of instructional media, has made major contributions to the field of independent study as administrator, teacher, scholar, and consultant. His integration of media in independent study courses anticipated the British Open University.

the NUEA and the International Conferences on Correspondence Education (ICCE). These two men played major roles in advancing the state of scholarly research in the field both individually and through several notable collaborations. Seldom has the field seen two individuals who could so effectively fulfill the dual roles of academician and practitioner.

Charles Wedemeyer served as the director of Correspondence Study at Wisconsin from 1954–1964. After leaving the program in 1964, he went on to hold positions as director of instruction and evaluation, director of instructional media, and director of the articulated media project. Wedemeyer retired from the prestigious William Lighty Professorship of Education at Wisconsin in 1976. He has continued to make major contributions to the field. As correspondence study administrator, innovative teacher, scholar, and international educational consultant, Charles Wedemeyer dominated this era in the history of university correspondence study. Recognition of his place in the field is reflected in the fact that both the NUCEA Independent Study Division and the *American Journal of Distance Education* give major awards for excellence

in the field of independent study and distance education scholarship in Professor Wedemeyer's name.

Gayle Childs began his career in correspondence study at the University of Nebraska in 1944. Childs had a 48-year career in education starting as a public school teacher and ending as an extension director and professor of secondary education at the University of Nebraska. Through speeches, scholarly articles, and his leadership both at Nebraska and within NUEA, Professor Childs has argued the need for more basic research in the field of correspondence education methodology. Like Wedemeyer, Childs continues to make contributions to the field. The Independent Study Division's Gayle B. Childs Award is given to individuals distinguishing themselves through outstanding writing, research, or leadership in the field of independent study.

The 1960s saw the publication of several landmark books, collections of essays, and even a film on the topic of correspondence study. Under the leadership of Charles Wedemeyer, Wisconsin sponsored a series of faculty lectures in 1960 and 1961 on corre-



From 1959 to 1973, Gayle Childs served as head of Class and Correspondence Instruction at the University of Nebraska, and later as director of extension. His research has been recognized internationally, and he led the expansion of the Nebraska correspondence study program.

spondence instruction. Wedemeyer invited correspondence study leaders to Madison to present papers on various aspects of the field with the objectives of facilitating an exchange of ideas on correspondence education and promoting a heightened sense of professionalism in the field. In 1963 and in 1966, Wisconsin published the *Brandenburg Memorial Essays*, collections of speeches and scholarly articles on the topic of correspondence instruction. The *Brandenburg Essays* provide present-day students of the field with an invaluable source of scholarly thinking on correspondence education in the early 1960s.

Responding in part to his perception of the positive changes and increased sense of professionalism among members of the Correspondence Study Division, Wedemeyer sought Childs' collaboration on a book that would document the issues being discussed in the correspondence study field. The result of Wedemeyer and Childs' efforts was *New Perspectives in University Correspondence Study*, published by the Center for the Study of Liberal Education in 1961. The monograph addressed topics ranging from an overview of correspondence study in the United States to a discussion of the education of individuals via mass media to considerations of characteristics of the self-motivated learner. Like the *Brandenburg Essays*, *New Perspectives* made a valuable contribution to the emerging literature about the field.

Also deserving of mention was another Wedemeyer project. Again in the early sixties, supported by a small grant from NUEA, Wedemeyer produced a 36-minute color film entitled "The Postage Stamp Classroom." Set to background music from Ravel's "Bolero" and Rimsky-Korsakov's "Flight of the Bumblebee," the film described the advantages and uses of correspondence study. It survives as a valuable historical record of the way correspondence study educators viewed their field at the time.

The Correspondence Education Research Project was born in response to pressure from leaders of the National Home Study Council and the Correspondence Study Division of NUEA to seek funding to research and write a major study on the status and place of correspondence education within the broader context of

higher education in America in the mid-1960s. With funding from the Carnegie Corporation, *Correspondence Instruction in the United States*, written by Ossian MacKenzie, Edward Christensen, and Paul Rigby, was published in 1968. This book has served for the past 23 years as one of the standard academic works in the field.

The authors found that university correspondence study faced a challenge for change in the mid-sixties. Correspondence study was typically an adjunct to the regular course of studies at U.S. universities. Variations in almost every aspect of operation from recordkeeping, to counseling, to degrees awarded were characteristic of correspondence study. Correspondence study instructors ranged from marginally qualified clerks to distinguished professors. Some universities were found to have solid, respected programs while others offered predominantly weak, substandard courses. The generally high course dropout rate of correspondence study students was linked to permissive admissions policies. Resources to support correspondence study programs at the university level were scarce when compared with the funding levels of many government-sponsored correspondence programs and the operations of many proprietary schools. Of the approximately 9,000 university courses offered in 1965, there was a tremendous duplication of effort. Particularly damning was the finding that most colleges of education ignored correspondence study as a method of instruction, traceable to the relative lack of research being conducted in the field by university-level faculty and practitioners. Despite these findings, the authors found no inherent weakness in the correspondence instruction method. They recommended that universities with established, strong traditions in correspondence study design programs of study to prepare professional practitioners in the area of home instruction and systems design (MacKenzie, Christensen & Rigby, 1968).

With the forces of change in higher education pushing for reform from a number of perspectives, the locus of the most critical movements for change relative to correspondence study was the Correspondence Study Division of NUEA. Whether through the adoption of progressive criteria and standards to guide the development of high-quality university programs, the sponsoring

of professional workshops, the launching of new research initiatives, or the preparation of documents designed to educate government agencies on the role of correspondence education, the division was a wellspring of innovation during the 1960s and 1970s.

The new professionalism sweeping the field and directing the focus of the division led to the establishment of a NUEA Committee on Criteria and Standards in 1960 chaired by Charles Wedemeyer. This committee played a dominant role in divisional activities in the early 1960s (NUEA, 1960–63).

Division-sponsored workshops became institutionalized in the early sixties with biennial meetings offered prior to NUEA national conferences. Workshops addressed issues such as training new staff, promoting better office management, and exploring ways to improve correspondence teaching (NUEA, 1969). These gatherings generally were hosted by the larger, more established university programs in the field—Illinois, Texas, Wisconsin, and Nebraska. The University of Illinois in 1958 offered a workshop on the topic of science teaching. Top-ranking college faculty in chemistry, physics, and engineering gathered to consider issues in teaching these subjects through correspondence study (NUEA, 1969). Another special conference sponsored by an Office of Education grant, "Newer Media in Correspondence Study," was held in 1962 at the University of Texas. Correspondence study administrators and audio-visual specialists met with representatives of RCA, Eastman Kodak, and other research companies to explore ways to use new inventions and planning devices for long distance study (NUEA, 1962, April).

The Correspondence Study Division Newsletter evolved into a valuable, high-quality document during the period and reflected many activities of the membership. By the mid-1970s, it was well on its way to fulfilling the mission John Davies and Neil Garvey envisioned for it in the early 1960s. The newsletter was conceived as a publication to record the activities of the division and also as an agent to help the division exert more force than any of its members could exert independently (NUEA, 1960, March). As

originally proposed in 1952, the responsibility for publishing the newsletter would circulate every year or two. During the sixties and early seventies it was produced by the University of Kansas, Kansas State University, Wisconsin, the Home Study Institute, Missouri, and Tennessee. In addition to covering routine business items and the announcement of new and unusual courses, the newsletter offered feature articles on correspondence teaching, course design, and student services, although the latter two themes were addressed only infrequently until the seventies. The newsletter profiled outstanding students and provided reviews of pertinent new books in the higher education field. During the late 1950s and early 1960s, the newsletter often contained fifty or more pages. With biennial change in the institution responsible for publishing the newsletter, the format and emphasis usually changed as well. The newsletter was published three to four times a year. Its editorial policy ranged from one emphasizing issues and theoretical concerns to an approach that presented reports of items of interest (for example, new course offerings) at the major institutions active in the division. The ever-changing divisional committee structure chronicled in the newsletter revealed the preoccupations and interests of the division during the period. Committee activities dealt with criteria and standards, faculty relations, interrelations with other divisions, publications, research, and federal relations. The commitment to publishing a high-quality newsletter without interruption demonstrates the high professional standard of activity of the division during the sixties and early seventies (NUEA, 1960–1975).

An activity that became a labor of love for many in the organization during the sixties was the publication that for years had been the exclusive product of the labors of Walton S. Bittner. "The Guide," as it came to be known, was *The Guide to Correspondence Study*, a listing of all correspondence study courses and programs offered by NUEA member institutions. Through the mid-1950s, this publication was the work of correspondence study pioneer Bittner, who served as NUEA national secretary for many years. In 1958–59, the Division revised and upgraded the quality of the guide and assumed responsibility for its biennial publication throughout the 1960s and 1970s (NUEA, 1958–1975). During this

period the guide was transformed into a primary information dissemination and marketing tool for divisional members. An interesting note for purposes of comparison to the current day guide, published by Peterson's Guides since 1980, is that in 1964, more than 50,000 copies of the guide were published in response to high student interest in correspondence study after a favorable article on the field appeared in *U.S. News and World Report* (NUEA, 1964).

An action of considerable significance occurred in 1968 when the Division of Correspondence Study changed its name to the Division of Independent Study. Members felt that a broader term was needed to describe the division in the 60s and to distinguish college-based programs from proprietary programs (Markowitz, Almeda, Logan, Loewenthal, & Young, 1990). The change also reflected the concern for the student's learning process. The division advocated a broadened conceptual base for teaching and learning that was open to innovation and experimentation with filmstrips, slides, videotape, programmed instruction, television, telephone conferences and a range of other multi-media teaching and learning aids (NUEA, 1969). When asked by Von Pittman in a 1991 interview why the division changed its name from correspondence study to independent study, Betsy Powell said, "We didn't. We were told by our Board of Directors to do it. That happened when I was chairman of the division, and one of the Directors told me that if we didn't do it, they would. It had never been discussed, we just followed orders" (Pittman, 1991).

Also in 1968, the increased interest in the development of high-quality instructional materials led to the creation of annual awards by the division for outstanding study guides. Each year member institutions were invited to submit their best study guides for judging by a committee of course designers and editors. The practice of presenting course awards soon became a highlight of the NUCEA national conferences. In 1972 awards were offered for the first time in college, high school, and noncredit categories. The awards process has proven to be an effective incentive to course designers and program administrators in their efforts to upgrade the quality of independent study courses (Driscoll, 1972).

In the sixties and early seventies many in the correspondence study field believed that the future of this instructional methodology was tied directly to appropriate incorporation of media into courses and program delivery. One practitioner, Alice Rowbotham (1971) of the University of California, predicted the demise of traditional correspondence study because of its continued reliance on slow, nineteenth-century technology—the postal system—to link student and instructor. In several significant experiments media were adapted for use in correspondence study instruction. The University of Wisconsin Extension Division received a \$387,000 grant from the Carnegie Foundation to create an open university predecessor which Charles Wedemeyer named Articulated Instructional Media (AIM). He described AIM as “an extension of the idea of correspondence study, an effort to explore the possibility of not only new kinds of mediated courses, but a new kind of teaching institution open to segments of the population according to their needs, conditions, and circumstances” (Wedemeyer, 1984, pp. 6–7). AIM embodied not only individual courses offered through the articulated approach that included correspondence study, radio, television, and programmed instruction in which audiovisuals were incorporated in each format, but it was also an off-campus, nonresident adult student degree-granting program (Rose, 1985). Although problems relating to the inability of Wisconsin Extension to grant credit for AIM courses and the hostility of faculty unwilling to creatively design new courses eventually contributed to AIM’s failure, the concept would be reborn in the United Kingdom, where it served as the basis for the Open University.

In 1974, Defense Activity for Non-Traditional Education Support (DANTES) was created by the Department of Defense to replace the phased-out USAFI program. The primary mission of DANTES was to support voluntary education programs for members of the U.S. armed forces. Since 1974, this agency has provided service personnel nationally recognized credit-by-examination and certification programs. It also has facilitated the promotion and delivery of independent study courses and programs through close cooperation with the Independent Study Division of NUCEA (DANTES Catalog, 1991).

This decade and a half of progress and innovation had its setbacks. In September 1960, the University of Hawaii announced that it would close its correspondence study program. In December of the same year, the University of Omaha announced the discontinuation of its Correspondence Study Department. Small enrollments, lack of faculty and administrative support, and an increase in evening and off-campus regular courses were cited as the major reasons for the demise of these programs (NUEA, 1960–61). Of far greater significance was the closing, in June 1963, of the Home-Study Department of the University of Chicago, where the university correspondence study movement had originated in 1892. The program had declined for years due to a lack of administrative and faculty support (Gerrity, 1976). According to Chicago's last Home-Study program director, Leonard Stein, "the university had long stopped using Home-Study as an appropriate method for degree students. . . . About 1960, a new university president proposed abolition of all continuing education" (Stein, 1988, June, p. 9). According to Charles Wedemeyer the program was discontinued because its president, Dr. George Beadle, a Nobel Prize-winning scientist, could not conceive that anyone could learn by correspondence (Gerrity, 1976).

By the mid-1970s, independent study practitioners were beginning to focus on producing better quality study guides and providing a comprehensive range of support services to students with an emphasis on professional academic counseling. Since the late seventies, independent study professionals have sought new strategies to achieve greater parity with traditional resident instruction and increased recognition among members of the mainstream academic community at their respective universities.

Independent Study and the Emergence of Distance Education, 1975–1991

The 16-year period from 1975–1991 has witnessed the development of a number of innovative programs and initiatives in university independent study. Expanding opportunities for inde-

pendent study professionals, new journal outlets for research in the field, experimentation with new technologies, a renewal of the biennial divisional workshops, the evolution of more sophisticated student services units, and the production of high-quality course study guides using the latest desktop publication systems have been just a few of the events that characterized developments. Concomitant with these changes were movements outside of the field that proposed new ways to deliver education at a distance using the latest technological innovations to link student with student and student with instructor. The late 1970s and 1980s introduced the related concept "distance education," which posed new challenges to traditional independent study, forcing a reexamination and redefinition of the place of independent study in this new international movement.

As independent study enrollments increased during the late 1970s and throughout the 1980s, many university-affiliated independent study programs expanded their professional staffs to meet the demand for more and better independent study courses, instruction, and program-related services. Professional status within the field has grown proportionally to the growth of independent study staffs and their level of education and training. Professionals in the field at institutions with both large and small independent study programs today possess more advanced academic credentials than was the case a decade earlier. They also come to independent learning from a wide range of academic disciplines. By 1991, university independent study programs offered a range of professional-level staff positions carrying such titles as instructional designer, student services specialist, supervisor of marketing and course production, curriculum coordinator, course editor, special programs coordinator, and student counselor. Clearly, opportunities have increased for mid-level, academic educational professionals seeking careers in a field once dominated by individuals carrying the title "correspondence study secretary."

By the late 1980s, most upper-level independent study administrators holding positions of program head or program director held a doctorate degree with a number of upper-echelon professional staff holding the same degree or a master's degree.

The acknowledged path for promotion to the top-level positions within university independent study was increasingly through the pursuit of accepted terminal degrees, usually the Ph.D., in established academic disciplines from colleges of education or liberal arts. By the 1980s, a recognizable cadre of more highly educated independent study professionals was emerging within the ranks of the Independent Study Division. This group raised the status of independent study on campuses and enhanced the acceptance of this educational methodology among university faculty and administrators. One disappointing note at the end of the 1980s was the fact that too few independent study directors were being advanced to deanship or vice-presidential positions within continuing education units across the nation. The independent study profession had not yet achieved the status of equal partner among other higher education units on university campuses.

One of the more significant events affecting university independent study in the past fifteen years was the founding of the *American Journal of Distance Education* in 1987 by Michael Moore of Penn State. Gayle Childs underscored the importance of the journal's founding by noting the increased opportunity such a publication afforded independent study practitioners as an outlet for ideas and information specific to the field of distance education (Almeda, 1988). Greater external visibility and recognition by the higher education community of the role of independent study had been stunted for years because of a lack of viable academic scholarly outlets in which professionals could publish articles specific to the field. Prior to 1987, most of the scholarly journals devoted to publishing material of interest to independent study were foreign based, such as *Teaching at a Distance* (United Kingdom), *Distance Education* (Australia), and *Research in Distance Education* (Canada).

Another event of significance in the advancement of distance education and, indirectly, university independent study, was the advent of the annual Madison Conference on Distance Teaching and Learning. Held for the first time in 1985, this conference is sponsored by the University of Wisconsin, Madison and the University of Wisconsin, Extension. It convenes each August in Madi-

son. This conference brings together distance education professionals and promotes the exchange and sharing of information by academics and practitioners from the distance education community. Although university independent study professionals constitute only one element of the many involved in presenting papers and serving on panels, the Madison Conference offers independent study professionals another outlet for advancing the place of university-based programs in the emerging distance education field. In six years the Madison Conference has become recognized as one of the premier gatherings for distance educators in North America.

Several trends within the member institutions of the NUCEA Independent Study Division illustrate innovation and increased professional activity of university independent study programs. Beginning in the late 1980s, the division renewed its practice of sponsoring workshops. In March 1988, Oklahoma, Oklahoma State, Texas Tech and the University of Texas, Austin, jointly sponsored a workshop in Dallas for course editors and instructional developers. Sixty-seven individuals representing 30 institutions attended the four-day workshop (NUCEA, 1988, June). In March 1990, the University of Nebraska, Lincoln, hosted a workshop entitled "Developing Total Independent Study Programs." More than 80 individuals representing 40 institutions attended (NUCEA, 1990). The Administrative Committee of the Division voted in September 1990 to build on the success of these workshops by establish a standing committee to organize annual workshops (Independent Study Division Administrative Committee minutes, 1990).

The growth of sophisticated student services support programs at leading independent study institutions such as Brigham Young, Iowa, Indiana, Nebraska, Missouri, Penn State, Wisconsin, and Texas Tech has contributed to program quality. Comprehensive student services, however, remain a future goal at schools with less well-developed programs.

During the past 15 years, a number of projects and initiatives have incorporated media into independent study courses and adapted new technologies for use in independent study programs.

Some successful projects and other, less successful ventures, warrant mentioning. The Penn State-managed PENNARAMA Network, the Mind Extension University, the University of Missouri's CALS system and the Electronic University Network are programs employing new technologies to enhance independent study instruction.

Prior to the mid-1970s, video materials supporting independent learning courses were delivered to students primarily through broadcast television, frequently using university-based public TV outlets. In the late 1970s and early 1980s cable television came into use as a delivery medium for independent study course programming. With an expanded library of high-quality telecourses developed by PBS, the Annenberg/CPB project, and the International University Consortium, to name a few, a number of institutions began using cable television to support their educational programs. The PENNARAMA Network was founded in 1977 at Penn State to make educational programming more readily available to cable TV subscribers throughout Pennsylvania. The Department of Independent Learning at Penn State assumed responsibility for programming this educational cable TV channel in conjunction with other higher education institutions in the state and was responsible for producing or purchasing the rights to air video materials for academic courses. Courses were offered statewide over PENNARAMA using microwave linkages into regional cable systems. This enabled students to view the video portion of their Penn State Independent Learning course on the dedicated-network cable channel. PENNARAMA continues in the 1990s (Penn State Archives, 1977–1991).

Founded in 1987, the Mind Extension University (MEU), the Education Network, a subsidiary of Jones Education Network based in Denver, Colorado, has assembled a consortium of higher education institutions to make telecourses and quality educational programming available nationally using cable and satellite delivery. In fall 1991, 18 institutions including University of California Extension, Oklahoma and Oklahoma State, Penn State, and Washington State used MEU to deliver video course material for independent study courses (MEU Catalog, 1991).

Two projects based on the application of computer technology specific to independent study are of significance. The Computer Assisted Lesson Service (CALs) system developed under the leadership of Doyle Felts, then head of the Independent Study Department at the University of Missouri, has been a success. The goal of this application of technology is the computerization of evaluation and feedback of objective-question responses to students in selected independent study courses. Other independent study institutions have adopted a modified version of CALs. Penn State, for example, uses the program extensively to deliver its automatic sprinkler training program. CALs won the Division's Award for Innovation in 1987.

A project involving computer applications for the delivery of independent study courses that realized very limited success was based on an experimental association with the Electronic University Network based in San Francisco, California, by six universities with established independent study programs—Illinois, Iowa, Ohio University, Oklahoma State, Penn State, and Washington State. Beginning in the mid-1980s, these institutions agreed to have selected independent study courses from their institutions electronically formatted for delivery using TYMNET phone transmission to link students and instructors via personal computers. Due to frequent changes in management and problems with program software at the Electronic University Network, enrollments in these electronically formatted courses never reached the levels forecast. At least four of the original member institutions involved in this project have withdrawn from the program. The idea of using computers and electronic bulletin boards to link students and instructors, thereby reducing the time necessary for the flow of lessons in independent study courses, is still a sound one that members of the Independent Study Division continue to explore.

The Committee on Institutional Cooperation (CIC) initiated a unique independent study project in 1977. The CIC, a consortium of eleven institutions (the Big Ten universities and the University of Chicago), received a \$486,000 grant from the Carnegie Corporation to cooperatively develop 24 upper-division correspondence courses (Committee on Institutional Cooperation, 1979–1981). The

goal of the CIC independent study project was to develop "hard to obtain" upper-level courses that would be shared among CIC member institutions. The courses offered through this project would assist students enrolled in external degree programs through New York State Regents, Thomas A. Edison State College, and similar programs at Iowa, Indiana, and Minnesota, to take full majors in English literature, history, economics, business administration, political/public administration, and sociology. The development process was to be cooperative with a designated lead author and two consultants. Ideally the three faculty would come from three different CIC institutions. Such a development arrangement was intended to encourage the eventual sharing of the finished course by the participating schools (R. Bachelor, personal communication to Stephen Wright, August 6, 1991). It was envisioned that CIC courses would, for the first time, make it possible for students to earn baccalaureate degrees from major universities entirely through correspondence (Rose, 1985).

To date, the CIC independent study project has met some of its goals and failed to meet others. The original goal of producing 24 upper-division courses primarily in business and social sciences has been met. Some of the courses were adopted by CIC members, although the prime faculty author was from another institution. Many of the courses written early in the project are still in use at the institutions where they were developed. CIC independent study courses were also purchased by other institutions for use in their independent study programs. The actual sharing of these jointly developed courses among CIC members has been limited, however, and the model has not been extended to other regions of the country (R. Bachelor, personal communication to Stephen Wright, August 6, 1991).

Throughout the late 1970s and the 1980s the Independent Study Division benefited from an abundance of enlightened and dedicated leaders who not only enhanced the accomplishments of the Wedemeyer/Childs generation, but pushed the field in new directions and to new heights. Among those making major contributions to the field were Mary Beth Almeda, California; Robert Bachelor, Illinois; Doyle Felts and Roger Young, Missouri; Von

Pittman, Iowa; Monty McMahon, Nebraska-Lincoln; Charles Feasley, Oklahoma State; Nancy Colyer, Kansas; Harold Markowitz, Jr., Florida; David Mercer, Penn State; Charles Hartzel, Tennessee; Norm Loewenthal, North Carolina; Deborah Hillengass, Minnesota; Larry Keller and Frank DiSilvestro, Indiana; Rich Moffit, Ohio University; Katherine Allen, Texas-Austin; William Driscoll, Ohio University; Fran Johnson, Wisconsin-Extension; Earl Pfanstiel, Kentucky; Ronald Malan, BYU; and Suzanne Logan, Texas Tech.

The division has undertaken and accomplished a number of ambitious and challenging projects that have advanced the status of university correspondence study in higher education. Detailed statistical profiles that chart virtually every aspect of all of the division's member institutions are produced annually. Annotated bibliographies have been prepared on current research activities in distance education and similar developments in the field of educational technology. The divisional newsletter, renamed *Ameri-*



NUCEA Independent Study Division Administrative Committee meeting, St. Paul, Minnesota, September 1985. Back row, left to right: Harold Markowitz, Jr.; Phyllis Luebke; Robert Batchellor; Von Pittman; Nancy Colyer. Front row: Roger Young; Joyce Nielsen; Norman Loewenthal; Deborah Hillengass.

can Independent Study, has been taken to new heights since the mid-1980s by the staffs at Brigham Young University and now the University of Iowa. The division has initiated an ambitious oral history project with the goal of capturing, on audiotape and in print, the recollections of independent study leaders from earlier generations. A separate Independent Study Division Archive, providing a document base for future research in the field, has been established at Penn State. Active course awards committees continue to promote the production of high-quality course study guides using desktop publication technologies. The use of state-of-the-art marketing techniques is generating large audiences for independent study courses among nontraditional learners. Many programs now employ tollfree telephone numbers encouraging communication between student and instructor. Several programs use FAX machines to transmit course lessons. A goal of programs across the nation is to promote the development of associate and baccalaureate programs totally deliverable through independent study. At the end of the 1980s, 80 NUCEA institutions reported enrollments of 348,000. Of these, 197,845 were college enrollments, 105,101 high school enrollments, and 43,193 noncredit enrollments (NUCEA, 1989-90).

Many challenges remain. Some contend that traditional independent study is on the verge of being overwhelmed and made obsolete by emerging educational technologies. There are concerns about course duplication and the seeming inability of institutions to find ways to more effectively share outstanding course study guides. Credit parity for independent study on campus is still a dream at many institutions. Convincing faculty of the legitimacy of independent study and the marginality of independent study programs on campus remain vexing problems. Yet, the future of university independent study appears bright. Enlightened leadership and the persistence of the printed medium are realities that insure a central place for traditional independent study in the distance education movement taking shape at the end of the twentieth century.

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Chapter 3

Collegiate-based Noncredit Courses

Sylvia N. Rose

Noncredit courses were among the first correspondence courses developed by universities in the United States late in the nineteenth century. They have contributed greatly to the development of the modern correspondence study movement. Over the years, collegiate noncredit correspondence courses have been identified by a variety of terms: adult, continuing education, cultural and special interest as well as professional, occupational, technical, and vocational. Regardless of the label, these courses typically have been designed to strengthen, enrich, and update knowledge in a wide range of academic and vocational areas.

Collegiate noncredit correspondence courses have evolved into two general categories—those specifically designed to meet a need and not intended for degree credit and those designed for university credit but which may be taken on a not-for-credit basis. This chapter will focus on the first category, courses not intended for degree credit.

Early Years, 1891–1906

The early history of collegiate-based noncredit correspondence courses is an important component of the history of correspondence study. Some of the first noncredit correspondence courses were developed to help citizens participate in a growing, industrial society. The courses mirrored the political, industrial, economic, and social changes taking place in the country.

In 1890 the United States was a relatively young country. It was still in the process of settling the West and coming to grips with the changes wrought by the Industrial Revolution. Women played an increasingly important role in society. New demands for both general and technical training combined with the tensions of a growing and diverse population to place new strains on the conventional suppliers of instruction.

The University of Wisconsin was the first state-supported institution to provide extension courses to expand much-needed educational resources. Correspondence study, a method of extension education, was created to reach those who could not come to the campus. A limited extension program was sanctioned by the University of Wisconsin Board of Regents in 1891 when the Regents approved a faculty resolution to develop University Extension correspondence courses (Rosentreter, 1957). This marked the acceptance of such courses as a part of the University of Wisconsin curriculum. The Regents authorized instructors to arrange for correspondence courses in their departments, and instructors were granted permission to charge and retain fees as compensation for the additional teaching load. Wisconsin's program was largely a response to the demand placed on universities to broaden their curricula and adapt their teaching to the needs for vocational training.

In 1892, University of Wisconsin President Thomas C. Chamberlain outlined future extension work built around university-based correspondence courses for the state's sparsely settled ar-

eas and lecture courses for the cities. As originally conceived, the lecture courses could also be taken with a correspondence component.

Specifically designed correspondence courses were formally announced in 1896 (Rosentreter, 1957). The two-dollar fee for an eight-lesson unit placed these courses within the range of many, and they could be taken for credit if desired. Although listings of course offerings through correspondence study were sketchy during the period from 1891 through 1906, the 1896-97 University of Wisconsin catalog shows that 20 departments offered 63 correspondence courses (Reed, 1982). Despite this energetic beginning, the program suffered an early demise.

Low enrollments, faculty disinterest, and the resignation of the correspondence secretary led to the recommendation of a faculty committee in January 1900 that the correspondence department be discontinued. The recommendation was adopted without argument. For six years the program would lie dormant.

1906-1935

Wisconsin was the first university after the University of Chicago to formally organize a correspondence study department along institutional lines (MacKenzie, Christensen, & Rigby, 1968). The reorganization of this department in 1906 as a part of the Extension Division provided a model for many other institutions in this country and throughout the world.

This was a period marked by industrial development and business expansion. While professional educators assessed the problems of industry, private correspondence schools had already developed industrial training courses. The commercial correspondence schools responded to the nation's thirst for ideas, but many used dubious methods. For some of these schools, fees were more important than the education imparted (Jacobs, 1946). An indication of proprietary schools' growth was documented in the experience of the International Correspondence Schools. Founded in

1891, this proprietary school boasted an enrollment of 225,000 by 1900, 1,000,000 by 1910, and more than 2,000,000 by 1920 (Curti & Carstensen, 1949, Vol. 1).

In summer 1906, Dr. Charles McCarthy, secretary of the Wisconsin Free Library Commission, helped finance and conduct a survey of private correspondence schools. The purpose of the survey was to investigate whether the University should enter the correspondence study field that the commercial correspondence schools were exploiting (Curti & Carstensen, 1949, Vol. 2). The survey results indicated that 35,000 state citizens spent more than \$800,000 a year for private instruction (Rosentreter, 1957). McCarthy was certain that the great numbers of Wisconsin residents enrolling in private correspondence school courses in carpentry, boiler tending, and related work indicated the pressing need for these kinds of courses and the public's willingness to pay for them. Although McCarthy stated that the private schools, when properly conducted, did much good, he insisted that the University of Wisconsin possessed the facilities to do better work and recommended the vigorous development of correspondence courses. The report convinced President Van Hise that this need for adult education ought to be met by the people's own university, at much lower cost to the individual citizen, and that better instruction should be given (Curti & Carstensen, 1949, Vol. 2).

University President Charles R. Van Hise reestablished correspondence teaching in 1906 as a function of the University of Wisconsin, appointing a full-time person, William H. Lighty, to take charge of its development.

When Lighty became secretary of correspondence study, President Van Hise appointed a committee to investigate and report on correspondence work and the university credits to be awarded for such study. Recognizing that some of the work would not merit academic credit, the committee felt that much university-level work should also be offered. This committee proposed that some courses be offered for credit, while others would be offered only as noncredit courses (Curti & Carstensen, 1949, Vol. 2).

Philosophical Conflicts

The evolution of noncredit courses at the University of Wisconsin reflected differences in the educational philosophies of the program administrators. Lighty, an idealist with a vivid imagination, believed strongly in the need for cultural development, intellectual discipline, and strengthening of character. He saw university correspondence teaching as an opportunity to spread culture throughout the state.

On the other hand, Louis E. Reber, appointed director of University Extension in 1907 and Lighty's superior, believed that the main purpose of extension was to offer utilitarian courses at several levels. He supported the philosophy of providing correspondence instruction to meet industrial and vocational objectives.

A debilitating conflict of the two philosophies did not materialize. Although their different frames of reference led to intense discussion, Lighty and Reber achieved in the long run a degree of balance in the program that would otherwise have been lacking. Reber was a man whose education and experience were acceptable to the University faculty. He accepted Lighty as the head of correspondence work, which gave Lighty the opportunity to develop cultural courses as well as University credit courses that the regular University residence staff would write and instruct. Reber supervised development of the new industrial training courses.

A Separate Correspondence Staff

Reber had visited the International Correspondence Schools at Scranton, Pennsylvania, to observe their system of course development before coming to Wisconsin in 1907. He had insight into course organization and oversaw the correspondence course writing at Wisconsin himself. He realized, however, that he needed a staff separate from the various University departments to develop the kind of courses he envisioned. In March 1908, three

months after his arrival in Wisconsin, Reber requested authority from President Van Hise to start appointing such a staff (Allen & Wedemeyer, 1957).

The president's approval for a full-time instructional staff for correspondence courses released University Extension from the domination of the university faculty and constituted a major step in the advancement of industrial- and occupational-training correspondence courses at the University of Wisconsin. Thus began an expansion of the program that made vocational and occupational correspondence study at the University of Wisconsin well known throughout the United States and beyond (Allen & Wedemeyer, 1957).

By 1911, Reber had appointed 16 instructors qualified to write noncredit vocational correspondence courses. During the same period, only seven instructors had been appointed for the cultural and university credit courses, including several positions shared with residence departments (Allen & Wedemeyer, 1957). The specialized vocational subjects included mechanical engineering, mechanical drawing, steam engineering, electrical engineering, civil engineering, structural engineering, and business administration. Noncredit courses also were offered in commercial law, highway construction, political economy, salesmanship, the profession of homemaking, housekeeping and homemaking for the rural school teacher, and health.

Special Textbooks and Traveling Instructors

Because of the special nature of the work, Reber believed that most correspondence study subjects should have special textbooks. He was aware that the International Correspondence Schools' shop-level textbooks made Wisconsin Extension's mimeographed study guides and other materials seem shabby. Reber decided that special textbooks for the lower-level vocational courses would be written by individuals in the profession and revised by teachers familiar with pedagogical methods (Curti & Carstensen, 1949, Vol.

2). The textbooks were to be organized so each chapter would become a lesson in a correspondence study course.

The University of Wisconsin Extension Division signed contracts with two book publishers: The McGraw-Hill Book Company to publish business and engineering textbooks, and D. Appleton and Company to publish business and home economics textbooks (Curti & Carstensen, 1949, Vol. 2). Between 1912 and 1926, 32 correspondence study textbooks were published by the two publishing houses. They were used not only by University of Wisconsin-Extension but also enjoyed national and worldwide popularity. For example, in 1916, some 87 colleges and universities, including Pennsylvania State University, Brown University, Maryland Agricultural College, Pratt Institute, and the universities of Illinois, Minnesota, and Pittsburgh, as well as 150 trade and technical schools, reported using one or more of the texts (Curti & Carstensen, 1949, Vol. 2). The United States Navy also placed a large order for the books on direct current machines, elementary magnetism, and electricity. By 1922, more than 288,604 copies of the special correspondence study textbooks had been sold.

More than 40 volumes were published in all, with royalties exceeding \$100,000 (Curti & Carstensen, 1949, Vol. 2). After 1920, sales began decreasing and after 1926, the Extension Division concentrated on teaching liberal arts rather than vocational courses, though the latter remained an important part of the correspondence program. By 1932, royalties dwindled to pennies, and the preparation of special textbooks ceased (Rosentreter, 1957).

In addition to the textbook publishing venture, the introduction of "traveling professors" to supplement correspondence study has also been credited to the University of Wisconsin-Extension program. Although University of Wisconsin correspondence courses were organized like those of the International Correspondence Schools, Reber introduced an important new feature. Because students often dropped courses after completing only a few lessons, the Extension Division provided itinerant instructors to hold classes with correspondence students at regular intervals

(Curti & Carstensen, 1949, Vol. 2). These circuit-traveling instructors helped students with problems in elementary mathematics, blueprint reading, mechanical drawing, and other subjects. This corps of traveling teachers made the Wisconsin program unique in the correspondence field and attracted national and international attention (Rosentreter, 1957).

According to Allen and Wedemeyer (1957), the development of vocational and technical correspondence courses during Reber's administration, perhaps more than any other service, brought public support and recognition to the University Extension Division not only from citizens of Wisconsin but from educational leaders throughout the world. These noncredit correspondence study courses had become a permanent service in the Extension Division of the University of Wisconsin.

Service for Special Groups

Noncredit correspondence courses at the University of Wisconsin focused attention on specific clienteles that included prison inmates, immigrants, women, and urban and rural school teachers.

Instruction for Prisoners. In 1907, the chaplain of the Wisconsin state penitentiary began to encourage inmates to take correspondence courses; the following year, Extension sought the cooperation of the state Board of Control in offering instruction in prisons and reformatories. Correspondence courses, particularly noncredit courses, were intended to rehabilitate interested individuals, teaching them habits of study, and giving them a chance to develop personal ambitions and skills that would be useful to them and to society. Typical courses provided training about gasoline engines, electric meters, store management, bookkeeping, and show card writing. In 1922, 192 prisoners registered for courses; two years later, in 1924, 145 prisoners were enrolled. Fifty-two percent of the prisoners who began these correspondence courses completed them (Rosentreter, 1957).

Civic Education for Immigrants, Veterans, and Women. During the first two decades of the twentieth century, university extension units helped promote civic responsibility, citizenship, and political leadership. Correspondence study was one avenue for preparing the residents of the state to discharge their civic duties more intelligently.

Immigrants coming to the United States and particularly to Wisconsin were encouraged to take courses in political science to help them systematically study for citizenship. According to the Bulletin of the University of Wisconsin Correspondence Study Department (1907), courses were offered in elementary civics, city improvement, law and politics of the press, legislative organization and procedure, parties and campaigns, international law, officers and employees, American diplomacy, constitutional law, and world politics. The Bulletin of the University of Wisconsin Correspondence Study Department (1921) lists a course in immigration and Americanization designed for those who wanted a better understanding of these issues in the United States. Students included teachers, ministers, welfare workers, businessmen, and foremen and workers in industry.

Another post-World War I citizenship-training effort emphasized coursework for veterans. Ex-servicemen were offered non-credit courses in bookkeeping, accounting, commercial law, business correspondence, elementary electricity, telegraphy, garage work, and shop work.

Women also were considered in need of "civic education" after they received the right to vote in 1920 and acquired full citizenship. Extension provided a variety of courses for women that could be taken through correspondence and group instruction. The Bulletin of the University of Wisconsin Correspondence Study Department (1920, March) carried the following promotional information:

To assist the women of the state in their training for citizenship the University Extension Division has prepared correspondence and group instruction in many subjects . . . Among these are: prevention of disease and home care of the sick; feeding children for health

and growth; public health nursing; child nature and training; community music and drama; Parent-Teacher Associations; voting methods and elections; and Americanization.

The bulletin listed other correspondence courses for women that were focused on the needs of homemakers of all classes. The instruction was planned and presented to be of great practical value both for women who had not received a high school or college education and for those who had. The courses were practical and written in straightforward language. The courses included *The Child in Health*, *The Child in Disease*, *The Expectant Mother*, *Infants' Clothes*, *Food Study for the Inexperienced Housewife*, *The Proper Feeding of the Family*, and *Furnishing and Decorating a Home*.

Courses for Teachers. The Correspondence Study Department offered noncredit review courses for teachers to enable them to meet requirements for county certificates, to provide them with valuable subject matter outlines and teaching suggestions, and to broaden their scholarship and prepare them for more responsible positions. Offerings included courses in arithmetic, geography, history, grammar, cataloguing and use of the school library, and physiology.

Rural school teachers in Wisconsin received special attention through correspondence courses prepared by instructors who were familiar with their problems and conditions. These practical courses gave simple, detailed instructions to teachers on the topics to be studied and the manner for presenting each lesson to pupils. Courses included *Sewing*, *Cooking*, *Laundrying*, *Home Nursing*, and *Sanitation*.

Development of Correspondence Programs at NUEA Institutions

Bittner & Mallory (1933) reported that 39 NUEA member institutions formally organized correspondence study programs between 1892 and 1931. Of these, five offered exclusively or pre-

dominantly noncredit courses—Columbia University, Massachusetts Department of Education, University of Michigan, Rutgers University, and Washington State University.

The Home Study program at Columbia University, established in 1919, was distinctly different from programs at other institutions in several ways. One fundamental difference, because of administrative practices at the university, was that all courses were offered on a noncredit basis. Because collegiate-level academic work at Columbia was not offered by correspondence study, the Columbia courses were considered "adult" education rather than "academic" instruction. These circumstances promoted the development of a program adapted to the demands of the general adult public (Smith, 1935). The department, however, attempted to maintain its courses on a high academic level and as an integral part of the University program. Other unique features of the Columbia correspondence study program included a national field service that recruited and advised potential students, extensive advertising, high fees for students, and relatively high compensation to instructors for preparation and instruction of courses (Bittner & Mallory, 1933). The Columbia program was closed in December 1937. Reasons given for its demise include faculty disenchantment, falling enrollments, disproportionately high costs of course preparation, irrelevant courses, inefficient advertising, lack of academic credit, and the adverse impact of the Great Depression (Gerrity, 1976).

Enrollments

Accurate registration records for collegiate-based correspondence study during the early years are difficult to obtain and assess. Reports are conflicting, estimated figures are confusing, and there is no uniformity across institutions in counting students and enrollments. For example, correspondence study records at the University of Wisconsin before 1931 also included evening and special classes held throughout the state. Not until the early 1930s did recordkeeping methods become more standardized and a more accurate picture of correspondence study become available.

Bittner and Mallory (1933) commented that 25 NUEA member institutions reported 10,000 noncredit enrollments out of a total of 56,000 enrollments in 1929–30. In 1928–30, estimated enrollments in noncredit courses in public institutions including NUEA institutions, teacher training schools, and other public colleges and universities numbered 33,000. In 1933, about 12 percent of all NUEA university catalogue courses (633) were noncredit. About one-fifth of enrolled students were in noncredit courses.

1930–1965

The events of these years—including the Great Depression, World War II, and the Korean War—profoundly impacted correspondence instruction in the United States. New challenges and economic difficulties forced correspondence study units to broaden their program bases and respond innovatively to rapidly changing circumstances. Resilience and adaptability were the hallmarks of this period.

Services and Special Programs

The services and promotional efforts of correspondence study programs during this era responded to the events of the times. For example, a 1934 Bulletin for the University of Wisconsin Correspondence Study Department outlined a plan for the Civilian Conservation Corps (CCC). CCC workers stationed in camps were urged to use their leisure time wisely and to prepare for advancement in business, industry, a vocation, or the professions to “meet successfully the problems that will arise from the new social order.” Many practical courses were offered for vocational preparation, business training, industrial and engineering work, preparation for teacher certification and licensing, and cultural and informational purposes. To enhance the attractiveness of correspondence study, the University of Wisconsin Board of Regents reduced course costs by 37% for CCC members.

A 1941 Wisconsin law made available to state residents serving in the Armed Forces any University of Wisconsin correspondence course without charge for instruction or tuition. Thus, Wisconsin citizens could continue educational programs that induction or enlistment had interrupted or could advance in their fields of interest. A special bulletin (University of Wisconsin Correspondence Study Department, 1941, October) listing all noncredit courses in academic, business, engineering, industrial, and technical areas helped service personnel better understand these educational opportunities.

United States Armed Forces Institute

A major noncredit correspondence study undertaking was the United States Armed Forces Institute (USAFI), a federal agency and correspondence school for active military personnel founded during World War II. Based in Madison, Wisconsin, USAFI engaged professional educators to prepare and administer its courses.

According to Wedemeyer and Childs (1961), USAFI's mission was:

to provide common services and materials by which the Army, Navy, Air Force, Marine Corps, and Coast Guard may supplement, for members of their commands, educational opportunities in subjects normally taught in civilian academic institutions, in order that the individual may render efficient service in his present assignment, increase his capabilities for assuming greater responsibility, and satisfy his intellectual desires. (pp. 6-7)

USAFI offered two distinct educational programs to service personnel: the first was the program of noncredit courses developed by USAFI at its Madison headquarters and the second was a much larger program of noncredit, credit, and high school courses made available through contracts with the extension divisions of more than 40 colleges and universities that developed and provided the course materials and instructional services.

Courses were offered in four different categories—technical/vocational (noncredit), university credit, elementary, and high school. The USAFI program started with 64 courses, mostly technical noncredit courses purchased from the International Correspondence Schools, plus several hundred correspondence courses made available through the cooperating universities. This number rose to a peak of more than 400 courses in 1946. In the mid-1950s, the University of Wisconsin Correspondence Study Department offered vocational noncredit courses in business administration, engineering mathematics, physics, drawing, civil and structural engineering, electrical engineering, mechanical engineering, and journalism. As late as 1962, USAFI still offered 207 of its own courses plus several thousand more through cooperation with major colleges and universities across the nation.

USAFI education offices enrolled students on military bases, on ships, and in foxholes (Rose, 1985). Average weekly enrollments reported for September 1959 through USAFI, Madison were 1,718 in correspondence study and 179 in participating college courses (Summary of Proceedings, 1959). USAFI sites were also located in Alaska, Europe, Hawaii, Japan, and the Caribbean. Worldwide enrollments rose to 120,883 in correspondence study in 1965, with 15,199 additional enrollments reported through cooperating colleges (MacKenzie & Christensen, 1971).

USAFI was phased out in 1974 for a number of reasons: the program cost too much; the Viet Nam War was ending, and military personnel were decreasing in number; the government believed it had fulfilled its role as a direct educational provider; and that military personnel would be better off enrolling on campuses near their home bases (Rose, 1985). USAFI impacted heavily on collegiate-based correspondence study for 33 years, and it provided service personnel with learning opportunities they might not otherwise have had.

Recognition of Achievement Certificates

In the early 1950s, the University of Wisconsin began granting an extension certificate to students who completed an approved program of noncredit courses selected to meet a specific educational or vocational objective. Each certificate program included both required subjects and several electives. The certificates, which were not designed for university credit, were offered in various fields in the Department of Commerce and the Department of Engineering. At this same time, the University awarded certificates to students who had successfully completed an individual noncredit course. These certificates recognized the students' educational efforts and enhanced their chances with potential employers.

Modern Era, 1965 to the Present

The rate of change in the technical, industrial, commercial, social, and professional areas of people's lives has accelerated to such a degree that supplementary education and retraining—life-long learning—have become requirements in both employment and day-to-day living. Correspondence study courses continue to be used to meet this need.

The demand for vocational and occupational courses in Wisconsin declined during the 1930s and 1940s as local vocational schools became more numerous and active and absorbed the elementary-level vocational students. In 1957, however, Wedemeyer wrote that collegiate-based noncredit correspondence study was growing more rapidly than any other program, reflecting many adults' need for continuing education. In 1958–59, 26 institutions listed 6,631 enrollments in noncredit courses (Wedemeyer & Childs, 1961). Business and commercial courses became the most popular offerings. In 1963, Wedemeyer again noted that many universities were developing programs primarily directed to those whose basic concern was continuing education, and that this trend

was on the increase (MacKenzie & Christensen, 1971). By 1964, half of the 64 NUEA institutions with correspondence study programs offered noncredit courses.

In the late 1960s the need to measure and recognize individual achievement in continuing education noncredit activities became apparent. The Continuing Education Unit (CEU) provided this measurement and gave a new dimension to higher education. It offered a systematic record of continuing education activities and a uniform system for gathering statistical data that could be consolidated and exchanged among institutions and employers, across geographic areas, and from one time period to another.

Formalized discussion of the CEU concept began in July 1968 (Long & Lord, 1978). At that time, a national planning conference sponsored by the United States Office of Education, the National University Extension Association, the United States Civil Service Commission, and the American Association of Collegiate Registrars and Admissions Officers convened to identify common concerns of groups interested in a uniform measure for nondegree-credit continuing education programs.

The National Task Force that grew out of the 1968 conference defined the concept of the CEU as "ten contact hours of participation in an organized continuing education experience under responsible sponsorship, capable direction, and qualified instruction" (Long & Lord, 1978, p. 2). The recommendations of the National Task Force on the CEU were accepted at the April 1974, NUEA annual meeting, and the final draft of the Task Force's CEU criteria and guidelines was published in July 1974. The demand for such a measurement was so great, however, that the unit was in use well before the final guidelines appeared. Many institutions of higher learning, including those offering noncredit independent study courses, have adopted the CEU standard, as have other sponsoring entities such as professional organizations, government agencies, and the military.

Custom-made Courses

Although noncredit correspondence programs have for the most part maintained the technical, occupational base of the early years, some differences have recently become apparent. For example, programs at University of Wisconsin-Extension Independent Study and other NUCEA institutions now develop noncredit courses for specific organizations. In the early years, the requesting organization usually selected existing courses that suited its needs. Now courses are developed to the specifications and standards of organizations, such as professional associations, to provide members with educational opportunities for professional updating, certification and recertification, career advancement, and various in-house diploma and certificate programs.

Another difference is that course development costs are now often covered by grants or shared by the requesting organization. For instance, in the business independent study program at University of Wisconsin-Extension, the requesting organization generally pays for the course writer, who has been approved by both the organization and the business unit; for the initial development and printing of the course guide; and for all promotional aspects of the venture. Other costs are borne by the business unit. Previously, the business unit assumed all costs.

Course fee sharing with the requesting organization began in the University of Wisconsin-Extension Independent Study business program in the mid-1980s. In order for the requesting organization to recoup some of its investment in course development and promotion, an agreement is negotiated with the organization by which it may receive 10 to 20% of the course fee paid by students. The remainder of the fee goes to the Independent Study business unit. Previously, the business unit received all of the course fee.

*Two Successful Penn State Programs*¹

Two programs offered by Pennsylvania State University's Department of Independent Learning exemplify the persistence and continued success of creative noncredit course programming in the modern era. The first of these programs is the 16-course automatic sprinkler program in existence since 1955. The second is the philately program, a five-course series designed to introduce and expand a student's basic knowledge and understanding of the world's most popular hobby, stamp collecting.

Each program, the first designed to train union apprentices and the second to advance the personal appreciation of a popular hobby, illustrates the continued viability of university-based, noncredit independent study course programming.

The Automatic Sprinkler Program. Thirty-six years ago, a gentlemen's agreement led to the establishment of a noncredit correspondence program that by 1990 had graduated 7,996 journeymen sprinkler fitters, produced millions of dollars of income for Penn State, and created a number of part-time faculty and staff positions (Annual Report, 1990). At the present time, the sprinkler program continues in operation as a multimillion dollar program, created and based on a handshake, for which no formal contract exists between the university and the professional association and unions involved in the project. Penn State Independent Learning has literally built its large and diverse college credit program with earnings generated by this enormously successful noncredit program.

In 1955, Raymond J. Casey, executive director of the National Automatic Sprinkler and Fire Control Association, speaking for both management and labor, contacted J.O. Keller, director of what was then General Extension at Penn State, about establishing a training program for members of union Local 669, United Association and Journeymen and Apprentices of the Plumbing and Pipe Fitting Industry of the U.S. and Canada (Annual Report, 1985;

¹I am grateful to Stephen J. Wright for providing this material on Pennsylvania State University Department of Independent Learning's noncredit program.

NUCEA, 1977). Casey realized the need to establish an educational training program for union apprentices who moved around the country from job to job and thus could never access educational programming tied to a single campus or location. Believing that proprietary correspondence schools could not deliver a complete program of courses of the type he envisioned, Casey approached Penn State. As representative of the national association of contractors and manufacturers of sprinkler systems, he had the respect and support of the major union in the field. Casey possessed the vision to seek out a professional educator affiliated with a major land grant university with a proven record in the field of correspondence study (D.F. Mercer, personal communication, June 14, 1991).

Late in 1955, an agreement established a program for teaching union apprentices the correct method of installing automatic sprinkler systems in commercial buildings across the nation. This noncredit instructional program would be delivered by the correspondence study method. Colonel William Young, head of Penn State's correspondence department, led the development of the sprinkler program (Annual Report, 1985).

Since the 16-course program had to be developed and written from scratch, College of Engineering courses in mechanical drawing, plan reading, and mathematics were used while the introductory courses for the new sprinkler program were being written. The lack of faculty resistance to the development of the program, which many still believe logically belongs in the realm of the technically oriented private correspondence school, is seen as a by-product of the established correspondence teaching tradition in the College of Engineering (D.F. Mercer, personal communication, June 14, 1991).

By fiscal year 1959–60, the Department of Independent Learning completed the courses in the original sequence. During that year, the department enrolled 429 apprentices in a total of 1,438 courses (Annual Report, 1985).

Throughout the 1960s and early 1970s the sprinkler program dominated the activities of the department. In 1971, 9,443 of 12,000 total department enrollments were in the sprinkler program (Annual Report, 1990). In the mid-1970s under the direction of David Mercer, the department began to use the earnings from this financially successful program to build a major college credit independent study program at Penn State.

From 1960 to 1990, 167,234 course enrollments were processed, of which 145,337 were successfully completed—a 30-year course completion rate of almost 87 per cent. During the same period, the Department of Independent Learning processed 1,732,864 sprinkler lessons (Annual Report, 1990). Since the start of the program, the number of unions whose apprentices have participated has risen from the original founding union, Local 669, to seven locals across the nation from Florida to California. The original program has grown from 16 to 19 courses, all of which are regularly revised and updated. Although the peak year for the sprinkler program was 1971 with 9,443 enrollments, the predicted demise of the program in the mid-1980s, when enrollments fell to 2,921, has not occurred. By fiscal 1989–90 enrollments in “Sprinkler” had risen to 7,601, and the program’s future looked promising.

The automatic sprinkler program has thrived in the environment of a major state-supported, land grant university and made uniform instruction available to highly mobile groups of unionized, blue collar workers across the nation. The sprinkler program at Penn State demonstrates the important role played by carefully designed noncredit university-based independent study programs in serving vast numbers of mobile adult workers.

The Philately Program. In early 1978, Donald Hild, a professional staff member of Penn State’s Department of Independent Learning, gave a presentation before the State College, Pennsylvania, Rotary Club. His topic was Penn State’s correspondence study program. Following the speech, Hild was approached by Colonel James DeVoss, executive director of the State College-based American Philatelic Society. Since Hild was an avid stamp collector,

DeVoss felt a possible alliance between the university and the Philatelic Society might be forged. It was. In May 1978 Penn State's Independent Study program received a \$4,000 grant from the American Philatelic Society to develop the first in a series of noncredit courses dealing with stamp collecting (NUEA, 1978).

In 1979, the first of the projected seven noncredit independent study courses designed to introduce people to field of stamp collecting was opened by Penn's State Department of Independent Learning. In 1985, the fifth course in the series was completed. The series includes two courses designed for beginning collectors, one for children, the other for adults; two intermediate courses for more advanced collectors; and a final course dealing with stamp printing methods.

Each of the philately courses is written and instructed by a leading national authority in the field, and Penn State's College of Liberal Arts sponsors the entire series. Aggressive promotional and marketing programs, including trips to the annual convention of the American Philatelic Society, have resulted in impressive enrollments (more than 1,000) since the inception of the program (Annual Report, 1990). The Penn State philately series is a model noncredit, university-level correspondence program that has promoted and enhanced enjoyment of one of the most popular hobbies in the world. The series also marks a successful collaboration between the university and a national organization dedicated to the advancement of leisure-time pursuits.

Other Successful Programs

Other universities have created successful collegiate-based noncredit correspondence programs. Purdue University, for example, has offered popular noncredit courses in central services for hospitals since the early 1980s. One of the two courses in the program provides technical training in central service to initiate employees to the hospital field. Certification as a registered central service technician is possible through successful completion of this course. The second course provides training in central ser-

vice management and also leads to a certification. The courses were developed in cooperation with the International Association of Healthcare Central Service Materiel Management and have enrolled 75–90 students a month.

The University of Florida offers a credentialing course in food service management in health care institutions. Established 23 years ago in cooperation with and according to the standards of the dietary managers' association, the course enrolls about 1,000 students a year.

California State University at Sacramento offers a correspondence program in potable water and wastewater treatment. The 12 courses that have evolved since the inception of the program in 1970 help students pass the state certification examination leading to a position of water treatment operator. Thousands of students enroll in the program each year. In 1989–90 the program enrolled 9,395 participants (NUCEA, 1991).

The University of Wisconsin-Extension Independent Study business program has cooperated with business and industry since 1968, custom tailoring correspondence courses for the following associations (average annual enrollments are given in parentheses):

- Linen Supply Association of America (68—2 courses)
- Volkswagen Of America, Inc. (205)
- Credit Union National Association (841—5 courses)
- National Association of Purchasing Management (338)
- Textile Rental Association of America (25)

The Department of Engineering Professional Development at the University of Wisconsin-Madison has developed an innovative program in disaster management that opened a new interdisciplinary area in correspondence study. Since 1983, 15 courses, 10 of which have been translated into Spanish, provide information to help people worldwide prevent and deal with natural disasters. The United States Agency for International Development Office of Foreign Disaster Assistance, the Pan American Health

Organization, United States Department of State Bureau of Refugee Programs, United Nations agencies, and private voluntary relief organizations such as the Red Cross provided funding for this project.

Many other NUCEA institutions could add to this list of programs. Between 1987 and 1990, about one-half of the 80 reporting NUCEA institutions offered noncredit courses. Noncredit enrollments totalled 43,193, or 12.4% of the Independent Study enrollments in 1989-90. The five institutions reporting the largest noncredit enrollments in 1989-90 were the following (NUCEA, 1991):

• Pennsylvania State University	18,421
• California State University (Sacramento)	9,395
• Purdue University	3,213
• University of Wisconsin-Extension	2,698
• University of Florida	2,326

Future Prospects

The future for collegiate-based noncredit independent study courses promises continued growth. More people will need job training and professional development. The growing numbers of older persons and retirees will require or demand retraining for employment in different areas or resources for leisure-time enhancement.

Since some people cannot leave family and job responsibilities to attend on-campus classes, and since business and industry may be unable to grant employees time off or pay for their travel to distant locations, correspondence study will continue to be an appealing and viable means of access to education.

Completion rates for noncredit courses are likely to increase. Historically, they have tended to be lower than rates for university credit courses. But tying job promotion, salary increases, and professional certification to coursework completion will provide an incentive.

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Chapter 4

University-sponsored High School Independent Study

Roger Young and Monty McMahon

Historical Overview

Although the initial development of university correspondence study occurred in the late nineteenth and early twentieth centuries, the correspondence method for high school students was not used in the United States until the 1920s. Australia, Canada, and New Zealand had experimental programs in supervised correspondence instruction that preceded programs in the United States.

According to MacKenzie, Christensen, and Rigby (1968), the leading innovator in high school courses by correspondence was Sydney B. Mitchell, superintendent of schools in Benton Harbor, Michigan. He began using correspondence instruction in 1923 to fill the vocational needs of terminal students who were still attending high school. Mitchell is credited with creating "supervised correspondence instruction" that called for local teacher supervision of students involved in correspondence courses. During the period 1923 to 1930 more than 100 public high schools experimented with this procedure (Childs, 1963). Publications such as the 1928 Sixth Yearbook of the Department of Superintendence

encouraged the use of supervised correspondence study to improve the secondary school curriculum. In 1929, the University of Nebraska was the first state university to experiment with supervised high school correspondence instruction through "The Nebraska Plan of Enriching the Curriculum of Small High Schools." This program was assigned to serve a specific need of both the University of Nebraska and local school districts in the state. After several years of pilot activity, Nebraska won a \$5,000 grant from the Carnegie Foundation in 1932 and an additional grant of \$5,000 in 1934. The Nebraska supervised correspondence instruction program for high school students was set up as a WPA project and received \$100,000 per year for 10 years from the federal government. At that time, most school districts in Nebraska were very small and rural. They did not have large numbers of students and therefore could not supply adequate professional staff and instructional curriculum to meet the needs of students wishing to attend college. The program supplemented the academic curricula of local high schools for purposes of preparation for and entrance into institutions of higher education.

The Nebraska program was also the first to require local adult supervisors for students throughout their courses rather than just having proctors administer course examinations. Individual student motivation, study activity, and subsequent course completion were, and remain, concerns for the independent study method of education. The developers of the Nebraska program felt that student course completion could be improved if students had an appropriate and interested adult monitoring and working with them locally. They were right. From the program's early years, the completion rates were much higher than the typical national averages for correspondence study without local supervision. Currently, the completion rate for students enrolled in the Nebraska High School Independent Study program ranges from 65% to 75%.

Yet, the high school correspondence movement has always had its detractors.

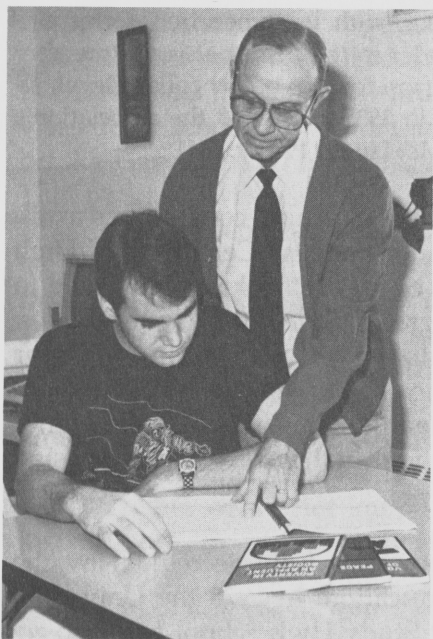
An issue which apparently led to bitterness in the smoke-filled rooms of convention hotels but which surfaced only politely in the scheduled and recorded sessions was that of high school courses

as university offerings. Nebraska, with its supervised correspondence study program, was a leader in the field, but many member institutions frowned upon extension courses below college level, although a convention resolution in 1933 expressed the association's interest in the Nebraska plan. (McMahon, 1976, p. 14)

Once a broad-based offering of high school courses was available, the Nebraska program began issuing a "Certificate of High School Equivalence." The success of the Nebraska program led to the establishment of similar programs across the United States. By 1958-89, 58,000 high school students would enroll each year in university-based correspondence study offered by 35 colleges and universities (Childs, 1963). Clearly, sponsored correspondence study offered a way for many communities to solve a pressing problem.

In 1967 the Nebraska program was fully accredited by the Nebraska State Department of Education. In 1978 the University of Nebraska-Lincoln Independent Study High School was also accredited as a "special purpose school" by the North Central Association of Colleges and Schools. Since 1967 the program has been authorized to grant a fully accredited high school diploma. While this was an obvious boon to the Nebraska program, it also contributed to the entire field of independent study by correspondence. The independent study method of education had been recognized and approved by educational leaders from traditional teaching/learning agencies and organizations.

In many states, universities had simply stepped in to fill a void in high school institution. "For the most part, universities became leaders in high school correspondence instruction because neither the states nor the local school systems seemed capable of accepting the task" (MacKenzie et al., 1968, pp. 32-33). Some notable exceptions included the states of Massachusetts, Oregon, North Dakota, Montana, and Alaska, where state-supported systems have provided correspondence or independent study opportunities. In addition, Arizona recognized the Phoenix Union High School as its official state center for correspondence instruction.



The University of Nebraska supervised high school correspondence study program offers educational alternatives for students who need to make up educational deficiencies or seek an expanded curriculum.

Correspondence educational opportunities at the secondary level originally focused on providing second chances for students who had not done well in the local classroom and on expanding the academic offerings of schools whose size or funding made it impossible to provide a comprehensive secondary curriculum. In addition, high school correspondence offerings aided certain categories of students. In earlier years there had been few provisions for homebound students. Consequently they either dropped out of school or weren't able to earn their high school diplomas with their original class.

Another group that made extensive use of high school correspondence study was the military. Servicemen and -women were encouraged to finish their high school education through correspondence study, the G.E.D., or both. The Department of Defense supported "citizens in military uniform" who were interested in continuing their education through organizations such as the United States Armed Forces Institute and the United States Marine Corps Institute (Sims, 1960). Mathieson indicated that "The enormous influx of men into the USMC during World War II was

accompanied by rapid Marine Corps Institute innovations particularly in (1) programs enabling recruits to complete their high school education and (2) the gradual development of their instructional staff" (1971, p. 5).

Recent changes in the requirements for admission into the service organizations have reduced the number of servicemen and -women taking high school level correspondence study, yet significant numbers of students use university-sponsored independent study courses to earn their high school diploma so that they may enter the armed services.

There has, in fact, been a shift back to serving high school students with the two original primary needs:

1. Courses for students who need to make up deficiencies
2. Courses for students who need or desire an expanded curriculum.

During the 1980s, President Reagan, the secretary of education, and national study groups determined that our educational system was lacking. Most states responded by increasing the requirements for graduation from high school. Consequently, university-sponsored independent study continues to play a role in providing expanded curriculum opportunities.

The National University Continuing Education Association's Independent Study Program *Profiles* for 1988-89 reports that there were 103,381 enrollments in 37 member institutions' secondary-level independent study programs—an increase of approximately 3% over the previous year. A review of statistical data for the past 10 years indicates a small but steady growth in enrollment in university-sponsored high school independent study courses.

Milestones in the history of university-sponsored independent study for high school students include the creation of supervised correspondence study, the influx of military students, and the increasing requirements for graduation in the 1980s. Recent trends in the use of technology, such as computers, video, and satellite,

may have an increasing impact. These trends will be discussed further regarding the future of university-sponsored high school independent study.

Enrollment Factors

The students who enroll in university-sponsored independent study may be adults who, for a variety of reasons, did not complete their secondary education in their teenage years. However, many correspondence students currently attend traditional high schools in the United States. Others are geographically isolated. Therefore, secondary education is needed for a variety of reasons by a variety of students.

A number of commercial high school-level independent study programs are available in the United States and advertise widely. However, students and high school educators value the credentials, credibility, and quality of education provided by known institutions of higher education when they consider sources for secondary independent study opportunities.

Those who seek the educational options and accessibility offered by independent study also want high-quality courses, and they want the credit and/or credentials they earn to be respected. They want results that they can be proud of and that will be meaningful for them. University-based programs are trusted because they are accredited by the same accrediting organizations associated with traditional residential high schools. These programs meet several specific needs of students and their high schools.

Curriculum Supplement. In its early years university-sponsored high school independent study helped students from small rural schools prepare for entrance into colleges and universities. These small schools had limited curriculum and staff and could not offer all the courses their students needed to be accepted by and succeed in institutions of higher education.

Even though many small school districts have disappeared as a result of consolidation and redistricting, the need for curriculum supplement still exists. Due to budget constraints, many schools (small and large) cannot offer the special-interest courses students request, nor can they provide teachers for low-enrollment courses. University-based independent study programs individually and collectively offer a variety of courses to supplement the local school curriculum.

Enrichments. Schools in many states are required by law to offer enrichment opportunities for their academically gifted students. Schools use university-sponsored high school programs to satisfy that requirement. The many course offerings available from these programs could not be duplicated by most residential high schools. As a result, local schools look to university-based independent study courses to supplement their programs for gifted students.

Deficiencies. High school students may confront a variety of educational deficiencies. They may not have the academic skills or background to succeed in a course they need to complete their high school program. These students may enroll in skill development courses offered by university-based independent study programs.

Academic deficiencies may either bar or delay some students' acceptance into college. University-based high school independent study offers options to erase a deficiency or meet admission/entrance deadlines because motivated students can complete a course at their own pace and not be restricted by the time-structured traditional classroom.

Some high school students face the possibility of not satisfying local graduation requirements due to failing a course, schedule conflicts, illness, or a variety of other reasons. University-sponsored independent study provides a way for these students to graduate on time.

Scheduling Problems. Scheduling problems occur most frequently in small schools that cannot offer multiple sections of the courses that students need or want to take. However, the same problem also occurs in larger schools, particularly with multitalented students involved in activities such as music, drama, athletics, yearbook, and cheerleading who must also satisfy college preparatory graduation requirements. University-based independent study provides an option for active students to meet requirements while allowing them and the school to benefit from their talent and participation in activities.

The Mobile Student. The mobile student may be defined in many ways: he or she may be a child of migrant workers, of evangelists who are constantly moving, of families on multiyear boat trips around the world, or of military families moving from base to base. Whatever their situation, these young people need a high-quality education but cannot enroll in traditional residential schools. University-sponsored independent study is their answer. They take school with them, wherever they may be. Without high-quality university-based independent study programs, they would have to leave their families and attend boarding schools or enroll in less credible commercial independent study programs, or their families would have to change their lifestyle.

Homebound. Most school districts have students who cannot attend traditional classes because of physical, emotional, or psychological problems, and every district is mandated to provide for their education. Many of these youngsters are bright, academically capable, and have a desire and a right to a high-quality education. Although some districts have professional homebound teachers, many do not. University-based independent study will continue to be the only viable option for these students.

Geographic Isolation. Not everyone in the United States has a local school nearby. Many youngsters in Alaska, for example, have no access to schools. Others in mountain areas of the United States

either do not have schools immediately available or they must leave their families and attend boarding schools. University-based independent study provides a high-quality educational alternative for these students. Educational opportunities should not be diminished for students whose parents work as forest rangers, Alaskan fishermen, or as radar operators in remote regions.

Similarly, many American dependents living outside the United States do not have an American system school available to them. American missionaries, military personnel, diplomatic staff, and corporate employees around the world want to keep their family units intact and still provide a high-quality education for their dependents. Their children often want to pursue their secondary education and return to the United States to complete their high school education or enter American colleges and universities. University-based independent study helps them achieve their educational goals.

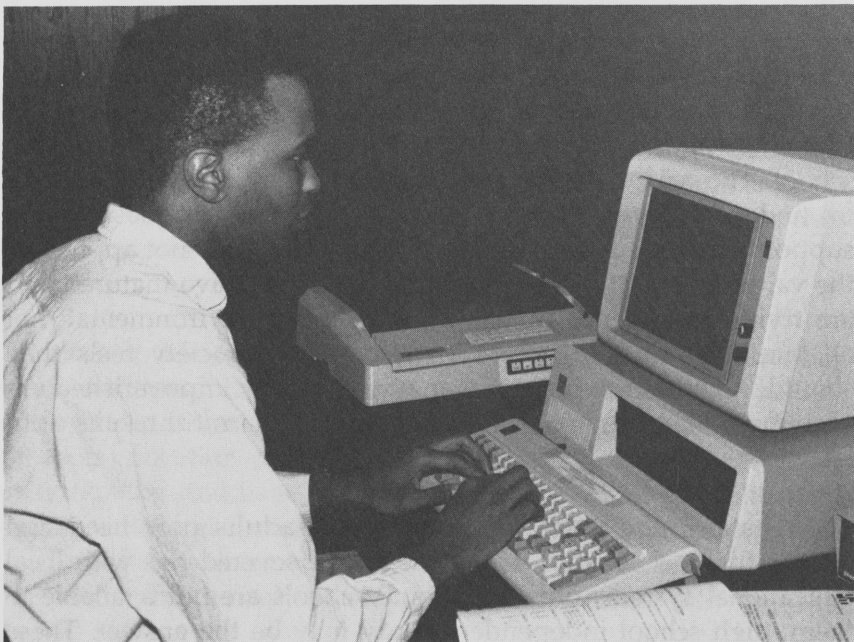
Adult Diploma Completion. For a variety of reasons, hundreds of thousands of adults in the United States have not completed high school. The reason may be economic: many children, in both rural and urban areas, have to leave school and get jobs to help support families. Or behavioral: many students do not appreciate the value of a high school education until they have matured and are trying to advance in the job market. Or environmental: not all families value an education as much as society feels they should. A child growing up in an educationally impoverished environment may drop out and not realize the harmful results until later years.

Whatever the reason, many of these adults now need and want a high school diploma. If they have severed ties with local educational systems or if traditional schools are not available to them, high school independent study may be the answer. These students can continue to work, fulfill family responsibilities, and still reach their educational goals for self-improvement. Without university-based high school independent study programs, they would either not reach their goals or would have to rely on com-

mercial independent study programs, which may not have the substance, status, or credibility employers desire.

Special Students. Some students have unique talents that prevent their pursuit of educational goals in conventional ways. These include students in the performing arts who wish to pursue training and performance in dance, music, theater, or students who are either world-class athletes, or are in training for that level of competition.

If university-based independent study programs were not available, these students would have to drop out of school, cease their training, competition, or performance, or seriously restrict



The University of Missouri Independent Study Department has used its Computer Assisted Lesson Service (CALs) to provide evaluation and feedback for many of its courses. This service provides instructor's comments that correct students' misconceptions, guide their study, and motivate them to better performance.

their activity so they could complete their education with a tutor or in local schools.

Recent Innovations

Computer-assisted Independent Study. After several years of investigating computerized instruction in the military and European schools, the University of Missouri in 1974 incorporated the use of computers into its correspondence program. Dr. Doil Felts, director, and Independent Study staff worked with the university's Computer Science Department to create a system of computerized lesson service that in 1987 won NUCEA's Award for Innovation from the Division of Independent Study.

The Missouri Computer Assisted Lesson Service (CALs) has taken independent study courses that are objective in nature and computerized the evaluation and feedback so that students receive printout responses to submitted lessons. The printouts provide instructional comments to students which correct misconceptions, guide their study with specific page references and key concepts, and provide motivational comment. While the basic CALs system made instructional comment available through use of student-submitted mark-sense answer sheets and programmed response, later improvements have incorporated telephone modems and/or floppy discs to make immediate response possible.

The educational advantages of the CALs system are the specific responses provided to students and the fast turnaround time. Numerous studies done at the University of Missouri and by the Defense Activity for Non-Traditional Educational Support (DANTES) support the hypothesis that the CALs instructional process has resulted in higher completion rates than for regular correspondence study and, in addition, has increased student satisfaction. The University of Nebraska in 1989 also incorporated a similar computer response system called Computer Assisted Response Evaluation System. Other universities have experimented with computer-assisted independent study but have not yet used it to a significant extent.

Field Representatives. Another significant activity undertaken in 1975 at the University of Missouri was the use of emeritus professors as field representatives. Their role is to provide a liaison to secondary schools to discuss the availability of independent study and to solicit reactions and suggestions for the curriculum. Missouri field representatives visit more than 1,000 schools each year.

The Future

The future of university-based high school independent study is bright. The needs and purposes served by independent study in the early days still exist and in some cases have come full circle back to the basic needs that caused high school independent study to be developed. One of the most basic purposes is the need for local curriculum supplement in secondary schools.

Over the years, many small rural districts have been consolidated into districts with large enough secondary school populations to justify offering a comprehensive curriculum for their students. As a result, the need for curriculum supplement has diminished. In recent years, however, accrediting agencies have increased curriculum and graduation requirements; thus, many smaller districts are again having difficulty offering specialty courses and/or are finding it difficult to recruit teachers for required courses. This is particularly true for foreign languages and sciences.

Although redistricting has meant better educational opportunities for students in rural areas, there are still many small high schools. Small communities typically see the loss of their own school as the end of their town and a loss of their identity. They will keep their school as long as they can even though it is not financially viable. They also may fail to see or acknowledge the educational disadvantages their children face in competition with students from larger high schools. Their position may not be defensible, but it is a reality in rural America. State departments of education may recommend, pressure, and legislate only so far. Thus, the need for curriculum supplement will continue.

Urban schools and students also have needs that university-based independent study can meet. Our urban populations are extremely mobile, with students moving in and out of districts. Large numbers of urban students enroll in independent study to make up for courses missed or problems in transferring credit.

A significant change in the attitudes of traditional educators has taken place in recent years. Many more teachers and administrators are receptive to alternative methods of education. Yet, independent study educators must continue to work with those traditionalists who still believe the only way for students to learn is to be in a classroom with a teacher for a fixed period of time. As a result of the attitude changes that have taken place, many schools recognize that, for a variety of reasons, all students do not or cannot learn at the same pace or in the same way.

The growth in alternative schools and the opportunities within traditional schools will continue, and university-based high school independent study will play an even greater part in providing courseware and opportunities for these schools and students. The self-paced format of independent study provides flexibility, while at the same time the alternative school educators can provide as much time and monitoring structure for the students' learning experience as they deem appropriate.

Traditional educators in recent years have become more sensitive to the unique needs and situations of their students. In some cases that sensitivity has been forced by legislation mandating programs for gifted students as well as quality and accessible educational opportunity for physically, emotionally, or mentally handicapped students. Whatever the cause, schools will increasingly look for educational options to the "lock-step" classroom geared to average students and for solutions to the educational opportunity problems faced by their students, as well as the problems of administrators or counselors.

Good teaching shares common procedural elements—there must be a learner, a teacher, and a method of transmitting knowledge from the latter to the former (Childs, 1990). That is true re-

ardless of the instructional format and is supported by hundreds of studies. As one study concluded, "The results of this research are clear and unequivocal—no particular method of teaching is measurably to be preferred over another when evaluated by student examination performance" (Dubin & Taveggia, 1968, p. 31). Essentially, then, good teaching techniques are the same whatever particular method or instructional tools are used, and educators would do well to consider the appropriateness and economic advantages of methods or tools employed.

The course development and instructional process of high school independent study will and must change. The impact of technology upon educational delivery systems will change the high school independent study process, and that change will undoubtedly be for the better. However, the impact of technology on independent study will be no greater or less than on classroom instruction or other methods of instruction. Good teaching will increasingly use new tools of instruction, and teachers and administrators at all levels need to be alert to possibilities for improving the process. This is not to say that independent study will change so that all students will find their way to a group experience either by live attendance, video satellite, or computer.

Economic realities will probably dictate that not all technology can be made available to all individual learners. Satellite instruction is expanding, but this technology requires wide access to make it economically feasible.

All too often, traditional educators insist on an instructional scene that requires students to be on a definite time schedule in a specific place with a faculty member either physically present or available immediately via technology. That lockstep approach has no proven advantages over independent study and takes away the very flexibilities that independent study was created to offer.

University-based high school independent study is alive and well. Those programs that are visionary and willing to take some risks in implementing the use of appropriate current and emerg-

ing technology will continue to flourish, although their technological needs will perhaps change in response to social and educational trends.

The evolution of independent study will require updating and changing processes while continuing to provide a flexible, self-paced alternative to group instruction. The issue is not whether printed material, video, or computers will be the dominant instructional tool in independent study; rather, it is how these tools will be used to provide high-quality instructional packages for individual learners.

Some university-sponsored high school independent study programs will undoubtedly adjust their mission to include current technology and to use the materials developed for individual students to enhance or support group study. In those cases, opportunities for individual learners may cease to exist. Other programs will use technology to enhance independent study but continue their mission of working with individual learners.

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Chapter 5

Academic Credibility and the "Image Problem": The Quality Issue in Collegiate Independent Study

Von Pittman

No single issue in the history of collegiate correspondence study, now independent study, rivals the question of quality in magnitude or persistence.¹ Administrators and other practitioners have always struggled to defend the credibility of the method, to seek greater acceptance of their instructional format within the academy, and to overcome the artificial barriers to its use.

Within the American university, a negative attitude toward the correspondence methodology has endured—and too often prevailed. This attitude has resulted from traditional academic sus-

This research was made possible in part by support from the Syracuse University Kellogg Project.

¹The terms "correspondence study," "home study," and "independent study" are used interchangeably in this essay, unless noted otherwise. When "Home Study" is capitalized, it refers to the formal name of the departments at the University of Chicago and Columbia University.

picion of—and resistance to—change, intellectual elitism, and the scandal-ridden history of proprietary correspondence schools.

Getting Started: The Problems of a New Method

The earliest efforts to establish collegiate correspondence study in the United States foundered on the resistance of traditional institutions to grant transferability of credit, the coin of the academic realm. Illinois Wesleyan University, a Methodist Church-affiliated institution, initiated the first collegiate program of non-residential correspondence education in the United States in 1874. From its inception, this program faced vociferous opposition from “educators throughout the nation” (Cates, 1965, p. 19), as well as some of its own trustees. Both internal and external critics maintained that the school could not support a sufficiently high level of instructional quality through this methodology. Quality control measures, such as frequent revisions of the curriculum, failed to satisfy them.

From all indications, the school’s faculty and administration worked extremely hard to satisfy their critics. *A priori* assumptions about quality, rather than documented complaints or systematic investigations, provoked and sustained this successful resistance to innovation. Illinois Wesleyan’s executive board finally yielded to the interminable objections, announcing the program’s end in June 1906 (Gerrity, 1976).

Illinois Wesleyan’s rigor and standards did not, however, represent the norm during the last quarter of the nineteenth century. A number of colleges of that day offered degrees—up through the Ph.D.—via various kinds of *in absentia* programs. In 1898, the United States Bureau of Education, then in the Department of the Interior, surveyed all United States universities and colleges that conferred the Ph.D. Its report concluded that a number of these institutions

do not provide instruction leading to that degree, but allow students to pursue the prescribed courses in absentia and to pass examinations at their homes under the supervision of a sentinel. (cited in Portman, 1978, p. 31)

Institutions such as the University of Wooster (Ohio) and the American Temperance University (Tennessee) conferred advanced degrees on students who had earned a bachelor's degree, passed supervised examinations over courses of independent study, and submitted a thesis. Such schools used the term "correspondence" in referring to their nonresidential studies, even though they bore little resemblance to the structured format of true correspondence programs, such as those of Illinois Wesleyan or, later, the University of Chicago. According to Portman (1978), most of these marginal "universities" turned to correspondence programs for a desperately needed source of income. Naturally, neither their motives nor their methods inspired confidence. Thus, their abuses resulted in the demise of not only their own programs but also that of Illinois Wesleyan. Publicity about these questionable programs also forestalled the establishment of correspondence study at other institutions.

Collegiate correspondence study enjoyed a rebirth beginning in 1892, with the founding of the University of Chicago, which featured a correspondence department in its Extension Division. New programs also emerged at a number of state universities, particularly in the Midwest. By 1915, the major universities of 19 states offered correspondence study programs (Bittner & Mallory, 1933).

Unqualified acceptance, however, did not follow. The faculty and administrations of all of these schools, for example, imposed limits on the number of courses a student could take for credit toward a degree. The University of Chicago, which allowed up to half the required work by correspondence, represented the generous side. Most schools fixed an upper limit of one-quarter to one-third (Bittner & Mallory, 1933; Gerrity, 1976). Even the University of Wisconsin, indisputably a pioneer, refused to accept ex-

tension courses—including correspondence courses—from any institution other than the University of Chicago, as late as 1930 (Snell, 1930).

A century later, it remains difficult to fully account for this institutional resistance to correspondence study as a *bona fide* medium of instruction. However, some factors seem certain. The traditional academic opposition to change, bolstered with certain *a priori* assumptions about quality, certainly played a part. In addition, the democratic assumptions that provided the ideological justification for correspondence study clashed with the elitist tendencies of many faculty members at the large, research-oriented universities. Finally, an unfortunate association with the often lurid scandals and sleazy practices of the worst of the proprietary correspondence schools also played a role.

Change, Credibility, and the Faculty

The importance of faculty conservatism can hardly be overstated. A process that provided for teaching and learning outside the confines of a campus, with physical separation of teacher and student, seemed a quite radical idea in American universities in the late nineteenth and early twentieth centuries. In a time otherwise noted for dynamic change within the industrialized nations, universities represented arguably the most conservative of all social institutions. As Bolton (1986) pointed out, while the medieval and Renaissance European universities had developed several distinct instructional models—lectures, group seminars, and one-to-one tutorials—each rested on

the unassailable presupposition that university teaching could and should take place only on campus. Without regular supervision by a duly accredited authority in the field it was impossible to moderate academic standards. (p. 9)

Thus, from the origins of the university, educators equated quality with proximity.

At the second conference of the National University Extension Association (NUEA), in 1916, University of Wisconsin history professor Wayland Chase addressed the problem of faculty resistance. That professors were skeptical, he said, was only natural. As guardians of civilization's legacy, they should rightly be wary of "those whose claims seem to suggest threat or harm" (p. 64). Yet, Chase declared, the advocates of correspondence study were finally beginning to win the skeptics over.

Efforts at conversion, however, proved slow and halting. Not only critics of correspondence study, but even some of its proponents accepted the assumption that its quality could never match that of the classroom. For example, Frank Herbert Palmer, editor of the influential journal *Education*, wrote an article in 1910 in which he extolled correspondence study. He nonetheless said, "It can never be favorably compared with oral instruction where the latter is available" (p. 47).

In 1922, the University of Kentucky's dean of Arts and Sciences told an NUEA audience about his reflexive reaction to extension in general and correspondence study in particular:

I can remember when I fought Extension work and correspondence courses, but they got in anyway. We endured them for a time and then embraced them and made them a part of us. (Buchanan, p. 15)

Elsewhere, matters did not proceed so smoothly. Columbia University belatedly and grudgingly initiated a Home Study Department in 1919. Its 1923 annual report revealed a lingering defensiveness:

We are well aware of the fact that correspondence instruction courses, no matter how carefully prepared or how faithfully completed, are not in good repute. (cited in Drazek, Mitchell, Pyle, & Thompson, 1965, p. 35)

Deans of extension and correspondence study directors have always been sensitive to faculty suspicions and doubts—and anxious to assuage them. A careful examination of the NUEA *Pro-*

ceedings provides evidence that most of them, historically, have committed themselves to a level of quality at least equal to that of on-campus instruction.

Democratic vs. Elitist Tension

One dimension of the concern about quality and standards derives from a tension about the definition, mission, and clientele of American universities, particularly during the last decade of the nineteenth century and the first three decades of the twentieth. Some presidents, such as William Rainey Harper at Chicago and Charles Van Hise at Wisconsin, proclaimed that universities had a democratic mission. Harper declared in 1892,

To provide instruction for those who, for social or economic reasons, cannot attend its classrooms is a legitimate part of the work of every university. . . . It is conceded by all that certain work among the people at large is desirable; those who believe in the wide diffusion of knowledge regard it as necessary. (cited in Mallory, 1916, p. 42)

At Wisconsin, Van Hise echoed Harper. He asserted that the dissemination of knowledge in a form accessible to all citizens was a part of the modern university's mission, equal in importance to research and residence teaching (Lighty, 1915).

While presidents might have proclaimed democratic values, however, professors and other influential critics within higher education frequently disagreed, framing their opposition in terms of defending "quality," "values," or "standards." At Wisconsin, some professors criticized Van Hise's emphasis on community service because it sacrificed "basic cultural values" to utilitarian goals (Gerrity, 1976, p. 88). The noted economist Thorstein Veblen scorned the Chicago program in his extended attack on William Rainey Harper in *The Higher Learning in America* (1918). Veblen defined an extremely narrow range of proper activities for universities, research and graduate education only. He called Harper's democratizing efforts, such as offering community service and ex-

tension work—including correspondence study—frills, no more appropriate to higher education than football or fraternities. Such distractions, he said, inevitably degraded a university's quality. There is some irony in this because, according to Gerrity, Veblen served as a correspondence course instructor while at Chicago. Perhaps he did it for the money.

As Bolton (1986) noted, distance education, including correspondence study, usually occurs in democratic societies, particularly those in which rural interest groups exercise influence, a proposition that helps explain the midwestern roots of collegiate correspondence study in the United States. Therefore, for those like Veblen who proposed an elitist university mission based on a European model of research and graduate education, correspondence study represented the threat of a foolish commitment to mass education.

Veblen's complaints pale in comparison to those of another highly influential critic of American higher education, Abraham Flexner. In *Universities: American, English, German* (1930), Flexner pointed to a direct link between extension courses and the "adulteration and dilution" of the University of Chicago and Columbia student bodies. This diminishing quality was caused by the fact that

the undergraduate student may have been enabled to satisfy a considerable portion of the matriculation requirements by extension courses or by [high school] correspondence courses taken under the Home Study Department. (p. 55)

Flexner challenged Chicago and Columbia for claiming correspondence courses offered instructional quality on a par with resident classes. That people who enrolled in them believed such outlandish claims, he said, proved their gullibility.

To an extent, the Columbia and Chicago programs were vulnerable to Flexner's charges. Both had emulated certain features of the large proprietary schools. They maintained representatives scattered around the country, essentially salesmen working on a commission basis. Both advertised widely in middle-brow maga-

zines and Sunday newspapers. Columbia, in fact, employed a commercial advertising agency (Langston, 1930).

Flexner's acerbic comments about correspondence study, and the ensuing reaction, "seemed to foreclose evermore any chance for its success at Columbia or Chicago" (Gerrity, 1976, pp. 164-165). The odd outcome of a 1933 review of Home Study at the University of Chicago (part of a full-scale self-study of the entire university) reinforced this assessment.

By all objective measures, the faculty and students at Chicago who engaged in correspondence study equalled or outperformed those who did not. The quality of instruction was clearly not a problem. The reviewers complained only that Home Study produced no original research and was thus not central to the university's mission. Unless it could be recast in an experimental model, they concluded, its continued existence was unjustified (Reeves, Thompson, Klein, & Russell, 1933). At Chicago, "quality" meant research, and only research.

"Quality" became, and has remained, the catchword of both the critics and the defenders of university correspondence study. The "quality issue" has provided a focus for the professional efforts and identity of collegiate practitioners. Early on, the National University Extension Association (NUEA), later renamed the National University Continuing Education Association (NUCEA), developed three strategies to confront the problems presented by the quality issue: (1) to disassociate themselves from the commercial correspondence schools in the minds of the public and the higher education community; (2) to encourage research that would establish the efficacy and comparative quality of their instructional methodology; and (3) to develop stated and widely accepted criteria and standards of practice.

Schools for Scandal: The "Matchbooks"

The most visible burden of collegiate correspondence study has been an enduring and embarrassing association with propri-

etary correspondence schools in the public mind. Historically, these profit-driven, entrepreneurial companies have ranged from fly-by-night diploma mills—sometimes little more than post office boxes—to large subsidiaries of multinational corporations. Many were, and are, ethically and fiscally sound, offering a first-rate educational experience. Others have made the correspondence education format the target of scorn, laughter, and even prosecution. However, even the best-run, most ethical proprietary schools have frequently offended the more conservative sensibilities of their university counterparts. Their aggressive, flashy advertising, including of course the notorious advertisements on matchbooks, has in large part accounted for this distaste.

Collegiate practitioners have always found it difficult to convince the public, potential students, and their own faculty of the quality of their courses when faced with the conduct of slipshod, unethical, or downright corrupt proprietary school operators. Worse, the commercial operators have often used the same clichés as the collegiate practitioners—"work at your own pace," "learn in the comfort of your home," and the like—thus furthering the public identification of the two sectors. This identification, as strong as it is persistent, has been a constant source of embarrassment and frustration to the collegiate sector. Wedemeyer and Childs (1961), two of the more reflective of the university practitioners, have called the image created by the proprietary schools the single greatest hindrance to the success of collegiate-level independent study.

As both the collegiate and commercial sectors of correspondence education expanded rapidly during the first decades of this century, relations between the two grew more strained. The collegiate directors, especially, did not want their work equated with that of people they considered fast-buck operators. In 1922, the director of extension at the University of Oregon called for government intervention to force the proprietary schools to either maintain minimal quality standards or shut down (Kilpatrick).

In a 1926 book, John Noffsinger wrote a spectacular exposé of commercial correspondence schools. While sympathetic to the

correspondence format, Noffsinger unsparingly pointed out the less savory aspects of the industry. His work led directly to the founding of the National Home Study Council (NHSC), a voluntary association of the more well-established proprietary schools. The newly created NHSC called for

mutual improvement through promotion of sound educational standards and ethical business practices within the home study field. (cited in Greene, 1930, p. 84)

In an obvious bid for credibility, the NHSC hired its critic, John Noffsinger, to direct the organization (Clark, 1965). The collegiate practitioners, however, remained wary of the proprietary schools, even the new NHSC affiliates. In 1954, the NUEA Board of Directors decided against any recognition of, or affiliation with, the NHSC (Subcommittee on Relations, p. 115).

In the 1960s the two organizations cooperated in the production of the book *Correspondence Instruction in the United States* (MacKenzie, Christensen, & Rigby, 1968) and the comprehensive research project on which it was based. However, no further formal ties between the public and private sectors have been explored seriously. On the whole, collegiate practitioners have remained sensitive to the legacy and image of the "matchbook university."

The Fight for Respectability I: Comparative Research

The administrators of collegiate programs have expressed their concerns about academic respectability "regularly and sometimes bitterly" (Wedemeyer, 1976, p. 11). Their quest for respectability has centered around two themes: comparative research and the development of standards. Both have developed simultaneously and more or less continuously.

Like other members of the academic community, correspondence study administrators have generally expressed faith in quan-

titative research and its power to persuade. Research on the effectiveness of the method, they have argued, especially studies that compare its educational outcomes with traditional face-to-face instruction, would inevitably persuade doubters and lead to academic credibility.

In 1929, the NUEA's Committee on Research called for "more scientific constructive research," with particular attention to

analysis of correspondence course content in typical subjects in different universities. Comparison of method, quality, assignments, amount of instructional service, practices in securing revision of courses, payment for new courses, etc. (Vogt, p. 36)

The same year, a University of Kentucky faculty committee undertook three research projects on correspondence study and extension in order to determine budget needs. The director of Extension told his NUEA colleagues,

The value of these three studies to us is rather evident in establishing in the minds of our faculty the fact that the student body doing extension work is a rather stable, high grade, serious minded group, and so regarded by the members of the faculty who instruct them. Studies like this should establish a certain confidence in the minds of administrative officers and enable us to see the road ahead a bit more clearly. (Patrick, p. 85)

Institutional research studies like Kentucky's became common. However, all too often they received no dissemination outside the sponsoring institutions. They rarely saw print, other than in the NUEA *Proceedings*. And in the absence of sophisticated research designs and peer review, their rigor was certainly suspect. In 1959, James and Wedemeyer argued that the lack of significant published research had obscured the value of the correspondence method. However, they saw the volume of serious research finally beginning to increase. Future studies, they said, "will undoubtedly improve public understanding of correspondence study and increase its general use in education" (p. 87).

Gayle Childs, of the University of Nebraska, provided a coherent, well-reasoned, and student-centered rationale for practitioner-directed research in a 1966 essay. While Childs clearly and emphatically linked research to the issue of quality, his argument did not center around the self-serving motive of seeking respectability within the academy. Instead, he said, practitioners should perform research as a pragmatic, efficient means of improving educational practice. Research could provide answers to difficult problems, test conventional wisdom, and provide a basis for sound decision making. Beyond this, professionalism demanded it:

We cannot, in good conscience, stand by and watch the rest of the educational world become more and more involved in research activity while we continue to operate on the basis of subjective judgment. (p. 129)

Childs illustrated the problem's gravity by declaring that while instructional television had been in use only a few years, the amount of research data on it dwarfed that which had been generated in all of the history of correspondence study. While the volume of research on correspondence study that existed at the time of this essay was not great, the record did include a number of scattered studies comparing achievement, dating from 1924. In fact, practitioners, including Childs, had performed some of them; disinterested scholars, including graduate students and educational psychologists, had done the remainder. In all of these studies, students in correspondence courses had either matched those enrolled in other instructional formats, in terms of educational outcomes, or exceeded them.

Childs reported on his compilation of research studies at the 1973 NUEA conference. He cited 37 empirical studies that had compared the achievement of students in correspondence courses with those enrolled in courses offered in other formats, this time including television courses and programmed learning. Again, students in correspondence courses either matched or slightly exceeded the achievement of students taking the same courses via different formats. Instructional methodology seemed to make no significant difference. Childs found this surprising, given that so many of the studies had been based on hypotheses that presumed

differences in achievement would emerge according to the choice of instructional methodology. This finding led him to posit "Childs's first law of impact of method on the human organism," which reads: "Insofar as general educational methodology is concerned, the brain doesn't give a damn" (p. 24).

In 1990, Childs noted that more recent studies have focused not on correspondence courses, but rather on comparisons of televised instruction and the conventional classroom. The authors of these studies (Barker, Frisbie, & Patrick, 1989; Whittington, 1987) have tentatively reached the same conclusion—that no significant differences in learning outcomes based on instructional methodology have been established. And according to one (Whittington, 1987), this lack of a positive result has been a matter of considerable disappointment to the proponents of electronic delivery.

A great deal of recent research on distance education and independent study, however, has focused less on comparative outcomes and more on such matters as attrition, organizational effectiveness, the attributes of learners and teachers, reward systems, and the impact of student services.² In short, researchers, including practitioners, have concerned themselves less with justifying their format and more with improving the quality of practice.

The comparative studies Childs (1990) cited, as well as more recent studies, amount to a compelling case in support of the proposition that correspondence study is fully as effective as—or at least no less effective than—any other teaching method. Yet, the hopes of several generations of independent study professionals that such evidence would persuade their fellow academics of the value, integrity, and quality of the methodology have not been realized.

While their hopes may have been rational, the response within the university often has not. Mathematicians, natural and social

²For example, see Feasley's (1983) compilation of research studies on distance education.

scientists, and humanists of all varieties demand the strictest of standards of evidence when dealing with theories and propositions within their own specialized fields. All too often, however, they do not recognize a need for the same standards of evidence and rigor when considering teaching methodologies. Even a direct confrontation with contrary evidence may fail to sway them. Professor George Hartung of Wisconsin-Extension, for example, reacted to the inconclusiveness of comparative research with the remark

Many students may *learn* more from CS [correspondence study] than from residence courses, but they don't experience that learning in quite as valuable a way. Correspondence courses have the content of residence courses but not the context. (1966, p. 92)

In other words, even when you win, you cannot win. In essence, Hartung, himself a correspondence course instructor, reacted to the existing evidence with a totally unverifiable, but deeply held, proposition. Unfortunately, his reaction probably represents the norm.

An uncritical acceptance of the conventional wisdom and a resort to stereotypes should be out of place within the large research universities that house most NUEA independent study offices. However, they comprise a persistent—and perhaps immutable—part of the environment. Given this reality, universal credibility may be a lost cause.

The Fight for Respectability II: The Drive for Standards

The NUEA, from its founding meeting, made establishing and defending standards of quality a major theme. As Edelson (1990) demonstrated, the founding members saw their organization's exclusivity—it limited membership to "university grade" institutions—as a means of maintaining quality. Restricted access, they believed, would enable the members to claim respectability for their off-campus and correspondence courses. They intended to

base their claims on the reputations of their institutions, rather than on instructional methodology. Thus, NUEA institutions would rank higher than other types of schools offering correspondence courses. Hervey Mallory, secretary of the University of Chicago's Home Study Department, urged the delegates to maintain the "university grade" requirement because, "I simply want to exclude those which are not of recognized standard" (1915, p. 218).

During the first three decades of the NUEA's existence, correspondence study and off-campus classes represented by far the greatest part of the activity of the member schools' extension divisions. Both critics and supporters tended to lump the two teaching formats together. By 1920, the NUEA had defined the semester hour as the standard unit of credit for correspondence study (Edelson, 1990). It also called for the standardization of practices within correspondence departments. Most importantly, it recommended that all courses, and the instructors who would teach them, should be approved by on-campus academic departments (Henderson, 1920).

Later reports provided greater detail, but this 1920 action endured as the basic code for all extension courses until 1955 (Edelson, 1990). In developing uniform nomenclature and standards, the NUEA had deliberately chosen not to draw up separate rules for correspondence study. However, various educational associations repeatedly asked the organization for a statement of standards specifically for correspondence courses. The Association responded in 1931 by adopting "Correspondence Study Standards." This document consisted of eight "rules." Most importantly, it specified the creation of a trained professional staff, with adequate administrative support. As Bittner and Mallory (1933) noted, the NUEA intended that this list of standards would establish correspondence instruction as an accepted—but unexceptional—part of the university's teaching mission.

The matter of standards, and of defending quality, was no small matter to the NUEA member institutions. Besides having to convince their own faculties, they had to deal with various

educational associations and governmental bodies. In 1936, the Conference of Deans of Southern Graduate Schools, over bitter protests from the NUEA, adopted the simple statement "No credits toward graduate degrees may be obtained by correspondence or extension study" (cited in Lowry, 1938, p. 101). Although the recognized regional accrediting agency in that area, the Southern Association of Colleges and Schools, never adopted this statement, it had a chilling effect on the offering of graduate credit via correspondence courses (Committee on Southern Association Regulations, 1939, p. 128; Lowry, 1938).

It was just this sort of sanction that the NUEA hoped to forestall with its periodic reports, "rules," and standards. The association resisted the idea of becoming—or appearing to become—an accrediting association; instead, it maintained that member correspondence study departments were integral instructional units within their universities. Thus, quality control was a matter reserved for those institutions, and the regional associations that accredited them. In spite of this official position, however, and without intending to do so, the NUEA gradually assumed a quasi-official accrediting status.

The NUEA never became completely comfortable with its emerging role as a kind of sanctioning or accrediting body. The NHSC's aggressive aspirations to gain such a status made NUEA members even more uncomfortable. In 1959, the U.S. Office of Education designated the NHSC's Accrediting Commission a "nationally recognized accrediting agency" (Clark, 1965, pp. 10–11). The NUEA feared the government might now recognize the NHSC as the arbiter of standards and practices for all correspondence instruction, regardless of its institutional source.

Research to this point has not revealed a direct link between the Office of Education's action and the push within the NUEA toward more detailed written standards for correspondence instruction. However, this development was certainly a factor. Probably equally important was the growing professionalism among NUEA practitioners. In 1955 the organization adopted a division structure, with Correspondence Study as one of the five charter

units. The status and autonomy of the division structure, it can be argued, resulted in a new sense of coherence and common purpose.

The new Correspondence Study Division's governing body, its Administrative Committee, met in Iowa City in September 1959, "to evaluate our prospects of becoming a nationally recognized organization in the field of home study" (Davies, 1960a). Those in attendance quickly agreed that "A Statement of Standards and Criteria for College and University Correspondence Study" should be a critical part of such an effort (Division of Correspondence Study, 1960, p. 44).

In January 1960, several leaders of the Division, including Leonard Stein of the University of Chicago, F. Lloyd Hansen of Minnesota, Charles Wedemeyer, and Gayle Childs, asked George Daigneault, assistant director of the Center for the Study of Liberal Education for Adults (CSLEA), for help in developing uniform standards of practice (Hansen, 1960).

Daigneault and the CSLEA agreed to assist in presenting a special workshop to create a "Code of Standards." John Davies pointed to the need for standards "we can publicize as *the quality control factors* [author's emphasis] of our . . . service" (Davies, 1960b). This call for the development of standards obviously touched a nerve. More than half of the 51 NUEA schools then offering correspondence courses sent representatives to Chicago for the workshop.

Wedemeyer opened the meetings on April 7 with a speech explaining the urgent need not only to develop, but to proclaim, measures of the quality of collegiate correspondence study in order

to hasten the new professionalism of correspondence study through boldly and fearlessly proclaiming our high standards, through attracting better qualified staffs, through better instructional processes, and better acceptance of correspondence study. (Wedemeyer, 1961, p. 3)

It is clear from the text of his speech that Wedemeyer saw the need to improve the actual quality of correspondence instruction as only one part of the rationale for standards. He also wanted to use them to boost the credibility of correspondence programs within the higher education community. The Office of Education's endorsement of the NHSC's Accrediting Commission appalled him. He found the NHSC Commission's subsequent offer to "accredit" correspondence programs of NUEA schools, "after appropriate examination," particularly galling (1961, p. 2). Wedemeyer called for no less than wresting leadership in correspondence study away from the commercial operators and into the university.

The workshop participants reviewed and redrafted working papers, debated various measures of quality, and created a divisional Committee on Criteria and Standards. This group presented a first draft of a criteria and standards document to the Correspondence Study Division at the 1961 NUEA conference. The Division ratified it in 1962 (Division of Correspondence Study, 1962; Wedemeyer, 1984).

The following year, after the adoption of "nonsubstantive" editorial changes, the NUEA's Board of Directors adopted the Division's document, entitled *Criteria and Standards (C & S)*, thus making it officially association policy (Division of Correspondence Study, 1963, pp. 63-64). The Executive Committee of the NUCEA Board affirmed this status in 1980, by directing that association visitation teams use these standards when evaluating the applications of prospective new members (Executive Committee, NUCEA, 1980, p. 1). Unfortunately, recent actions by the NUCEA's Committee on Liaison for Accrediting and Standards in Continuing Education (CLASCE) revealed that the NUCEA has neither institutional memory of, nor regard for, its earlier actions.³

³In 1990, this committee recommended standards and procedures for all facets of continuing higher education, including independent study. Unfortunately, this report betrayed a lack of familiarity with the independent study method and the extant Criteria and Standards. After much discussion, the NUCEA's Board of Directors indefinitely tabled the CLASCE report.

The Correspondence Study Division—after 1968 the Independent Study Division—has maintained its Criteria and Standards Committee continuously since 1961. This group continues to monitor trends and suggest changes. The Division has enacted many minor and several major revisions of its *Criteria and Standards* as the times and changing technologies have demanded.

Formal codified standards of quality have not fulfilled all the hopes of their authors. For example, universities have not ended such arbitrary practices as limiting the number of hours toward a degree that may be earned through independent study. Yet the creation and maintenance of *Criteria and Standards* must be considered a remarkable achievement. *Criteria and Standards* has been used in many self-studies, external reviews, and visits by accrediting teams from the various regional associations. Other organizations in the field of distance education have consulted this document before drafting their own quality standards.

Although the impact of C & S has been disappointing in terms of increasing the stature and credibility of independent study on university campuses, the effort has, nonetheless, borne fruit. It seems clear that the Correspondence Study/Independent Study Division's efforts in initiating and upholding stated criteria and standards have had a positive impact on the maintenance of quality. And in the final analysis, the actual quality of instruction and operations easily exceeds in importance winning the esteem of others. And quality has definitely been served.

Playing the Foil: Independent Study and the Electronic Media

Currently, the most vocal and frequent criticism of the quality of traditional print-based independent study originates not with the traditional faculty guardians of academic quality, but with some proponents—learned and otherwise—of various electronic course delivery media. These critics seem to think that by alleg-

ing weaknesses in the print-based medium they can confirm the worthiness of their own delivery systems.

Some promoters of televised college courses, for example, have sought to contrast what they perceive as weaknesses in the quality of correspondence delivery with the promise of their media. In a recent book on instructional development (Johnson and Foa, 1989) Jocelyn Calvert observed that because of institutions like the British Open University and the Annenberg/Corporation for Public Broadcasting [telecourse] Project, the "simple correspondence course raised its aspirations." Distance education standards rose, she said, "as models of higher instructional quality became available" (Calvert, 1989, p. 96).

This sort of glib assurance characterizes the proponents of telecourses. They remain adamant in spite of a remarkable lack of evidence (Childs, 1990), recent studies that have cast serious doubts on the effectiveness of the BOU's televised components (Harris, 1987; Willen, 1988), and the uncertainty about the Annenberg/CPB Project's future, following the loss of its major funding source. This uninformed proclamation of superiority is not surprising, given that telecourse promoters continued to offer the University of Mid-America as the prototype of a successful consortium for several years after its total collapse (Pittman, 1985).

The uncritical acceptance of the assumption that electronic delivery necessarily begets a higher standard of quality is, of course, annoying when delivered by persons enamored with hardware, but lacking familiarity with the independent study method. However, it truly rankles—and is not so easily dismissed—when coming from continuing education professionals who know the field well. In a much-quoted article, J. O. Grantham, a pioneer in satellite teleconferencing, suggested that if continuing education administrators would "shake the dust off" traditional correspondence study and add television components, they could then create "sophisticated" programming (1982, p. 30).

Becky Duning (1987), another teleconference promoter, as well as a former director of a university independent study program

and chairperson of the Independent Study Division, took the quality argument in a different direction. Many independent study directors, and the Division itself, she said, were becoming irrelevant to the field of distance education because of their failure to boldly embrace the new technologies and to support and applaud those who did. In essence, she shifted the quality argument to the caliber of the practitioners themselves, who she saw as overly cautious, inward looking, unassertive, and above all, tragically unconvinced of the inevitability and superiority of electronic course delivery.

After a century of efforts to validate the method through research, and a long and ongoing process of developing standards of quality, not only do university independent study programs remain under siege, they face attackers advancing from more directions than ever. And those who are fellow advocates of distance education are perhaps the most bothersome of all. As noted above, electronic delivery systems have not measurably improved student performance, as compared to either classroom or correspondence instruction (Childs, 1990; Whittington, 1987). The carcasses of expensive, failed schemes litter the landscape. One can only speculate that the shrillness of independent study's critics derives from frustration. In spite of all of the glowing promise, the electronic media they champion, like correspondence study, have failed to win over the university faculty.

Advocates of both electronically delivered and print-based distance instruction should realize that their common concerns and interests outweigh their differences; both are victims of the quality issue. And "quality" still represents the major source—purportedly at least—of resistance to *all* forms of distance education by academic conservatives, particularly those at research-oriented universities. Were all distance education practitioners to recognize their commonality of interests, perhaps they could begin to make progress on this front. Strong print materials can only complement electronic course delivery; and the use of telecommunications media should enhance print-based courses.

That various factions of distance education practitioners are trying to promote their interests by denigrating the quality of the product offered by their peers is unfortunate. Distance education is not a zero-sum game. A greater public and academic acceptance of the broadest possible concept of distance education as a range of high-quality alternatives to traditional resident instruction can only benefit all factions. The interests of independent study professionals are now irrevocably entwined with those of all other university-level distance education practitioners. Where acceptance, public image, and recognition of quality are concerned, for any of us to succeed, all of us must succeed.

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Chapter 6

Electronic Media and Independent Study

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and
James Andrews*

The new electronic media are often touted as the “wave of the future” in distance education. In some cases, their champions have even predicted the impending demise of traditional correspondence instruction and its replacement with telecommunications-based delivery systems (Pittman, 1987). Among the technologies touted over the years have been the telephone, radio, a variety of broadcast television applications, computers, audiocassettes, videocassettes, the video disk, and a host of other electronic media. Correspondence study providers regard such developments with a mixture of joy and apprehension. The joy is prompted by the tremendous potential that each new development has to enhance traditional correspondence study. The apprehension is prompted by the less-than-impressive record of many past attempts to enhance correspondence study and by the tenacity of print-based independent study (Duning, 1987).

This chapter will briefly review the past twenty-five years of efforts to integrate correspondence study with electronic media,

beginning with the many calls for such efforts in the mid-to-late 1960s. The theses of this discussion are that new technologies have been less effective in improving correspondence education than anticipated, that correspondence study educators have not played the influential role originally envisioned in using electronic media to reach distance learners, and that efforts to integrate electronic media with correspondence instruction encountered challenges not anticipated by the early enthusiasts. The analysis is focused on an examination of the evolution of the issues from the perspective of those within the National University Extension Association (NUEA), later the National University Continuing Education Association (NUCEA), and specifically from the point of view of the membership of the Correspondence Study Division, later the Division of Independent Study. The chapter concludes with some points for consideration as correspondence education moves into its second century.

The Era of Enthusiasm

Efforts to integrate electronic media with the correspondence study method have a long history. As early as 1933, Bittner and Mallory noted some enthusiasm for radio as an electronic enhancement to correspondence study. A number of colleges and universities in the United States offered credit courses via radio during the 1920s and 1930s, but by 1940 radio was no longer used extensively (Pittman, 1987). During the 1950s and 1960s broadcast television was widely heralded as the technology that would revolutionize education. Many independent study providers were especially enthusiastic about television's potential to enhance correspondence education. In his review of the status of correspondence study in the mid-1960s, Charles Wedemeyer (1966) noted a trend toward the use of new media and new technology in teaching by correspondence.

Much of the literature of the day advocated applying a systems approach to distance education in which a variety of media and formats would be utilized with each



In the 1950s and '60s many independent study professionals lauded broadcast television as a technology that would revolutionize education.

given the function it can best perform, based upon the testing of formats and components and the selection of methods because of demonstrated efficiency. What is sought here is a system which reinforces correspondence study with audio and visual communications but which keeps the student free from rigid learning schedules so he can go at his own pace. (Wedemeyer, 1966, p. 11)

In such a scheme correspondence study was seen as the foundation of a teaching/learning system that included electronic media in a variety of supporting and enhancing roles. It was anticipated that effort would be focused on providing the individual learner with the best learning experience possible using whatever form of media proved to be most effective.

Furthermore, many correspondence study educators hoped to lead the development and adaption of electronic media in distance education in ensuing decades. Wedemeyer (1966), for example, argued that

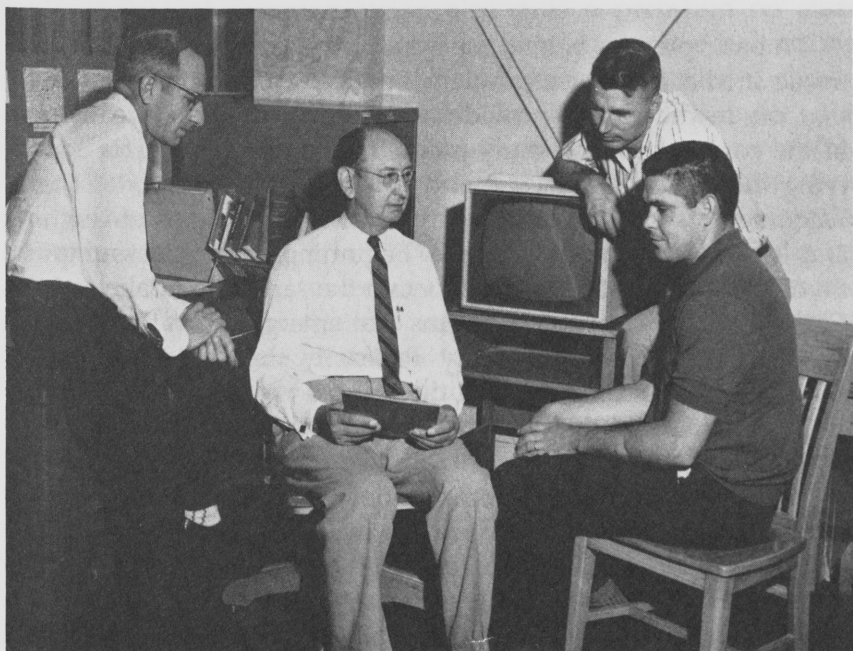
correspondence educators are uniquely prepared to participate in the development of learning systems to work with specialists from other media and content authorities. . . . [The correspondence study educator's] experience in designing courses for a one-to-one personal relationship between the teacher and learner who are separated is likely to be a key factor in the design, acceptance, and success of the new type courses. (p. 14)

Part of the appeal of the new media was its predicted ability to open access to education on a much greater scale than ever before. For educators already committed to expanding educational opportunities, the mass media in particular appeared to open the door to many potential students who had been denied access in the past. Television appeared to be the key to that door. John Davies (1963), who served as the chair of the NUEA's Division of Correspondence Study in 1960, noted that

[n]ever has the opportunity of reaching into the actual home been so startling as the opportunity given through television. Here is the open door to those of us who find it possible to bring to the attention of adults the opportunity of vigorous and vital learning, and the chance to tie such learning to planned programs of reading and study that will assure high quality and accomplishment. (pp. 20-21)

These educators envisioned the future of correspondence study in the integration of electronic media and traditional correspondence study. By incorporating a variety of media, each of which would be used where it would have the greatest impact on the effectiveness of the teaching/learning transaction, correspondence study educators envisioned improving the effectiveness of instruction and expanding access to education. Given their expertise and experience in providing instruction to learners who were separated from the campus, these educators expected to play a significant role in such developments (Pittman, 1990). Many of the leaders in the field anticipated that they were on the verge of a new era in distance education, that correspondence study providers would play an important role in that new era, and that electronic media would be an important factor in correspondence study in the future.

With twenty-five years' hindsight, it appears that correspondence education did not develop quite like the electronic media enthusiasts within the field anticipated. Significant efforts to reach distance learners through extensive utilization of electronic media were begun during the 1960s and 1970s. They often fell far short, however, of their lofty goals. In fact several, most notably the State University of Nebraska program and its derivative the University of Mid-America, were spectacular failures. Moreover, these ventures often went forward without extensive, or in some cases even minimal, involvement by correspondence study educators (Wedemeyer, 1975). As one author has noted, even within correspondence study programs the media have "been embraced on a scale far smaller than might have been hoped or expected" (Duning, 1987, p. 41). In gatherings at professional meetings, correspondence study educators often share horror stories about their



Gayle Childs (seated, to right of television set), director of correspondence study at the University of Nebraska, meets with course instructors in 1959. Correspondence instructors were "uniquely prepared" to work with media specialists and content authorities to develop new learning systems.

frustrating attempts to integrate electronic media and correspondence education.

The questions that emerge from this discussion are, Why did the electronic media have much less impact on correspondence study than anticipated and why were correspondence study educators less a factor than they anticipated in the extensive use of media to reach distance learners? The answers may stem from several factors, but three seem to be paramount: the effectiveness of media in improving learning, the cost of the media, and basic characteristics of correspondence study inherent to the use of many electronic media.

Problems in Teaching and Learning by Correspondence

A basic premise behind the systems approach to integrate electronic media and correspondence education was the contention that the media would provide a key to overcoming weaknesses in the correspondence study method. A starting point for identifying those weaknesses is found in Gayle B. Childs's (1971) and Wedemeyer's (1971) classic analyses of the problems of teaching and learning by correspondence. Beginning with the assumption that all instructional situations contain the same essential elements, Childs identified several problems that emerge when the situation involves correspondence study. Primarily these problems result from the extensive reliance on the printed word in the communication process and the two-phased nature of the method.

In the first phase of correspondence instruction, the student interacts with the texts and printed material prepared by the independent study provider, generally in the form of the study guide. The study guide indicates what the learning objectives are, what learning experiences are to be undertaken in order to attain the objectives, and what resources will be used in the learning process. During this first phase the learner is isolated from the teacher and from other learners. In the second phase, the learner

interacts with the instructor through the submission of evidence of learning, usually in written form through the mail.

The heavy reliance on written instruction prepared before the student actually enrolls makes accommodating individual differences difficult during the first phase of correspondence instruction. Correspondence study is a rather rigid instrument that typically channels all students—whatever their background, experience, interest, or capability to learn—through the same set of learning experiences with little regard for their readiness to learn. In addition, there are limitations on the ability of the printed word to generate interest in a learning task. The success of the method is, therefore, heavily dependent on the motivation of the learner—a motivation that is internal to the student and that is beyond the influence of the provider of the learning experience.

The reliance on the written word as the primary, if not the only, means of communication also puts a premium on clear written expression during both the teaching and the learning phases of the process. During the first phase the burden is clearly on the author of the study guide. As Childs (1971) noted, the study guide must incorporate language that “may not possibly be misunderstood” (p. 114). In addition, the physical separation of the learner and teacher during correspondence study means that the teacher cannot sense when a misunderstanding occurs and take immediate corrective action. Corrective action cannot come until the learner moves into the second phase of the process. Finally, there are limitations to the ability of the written word to convey meaning or understanding. To enhance understanding requires more than simply reading about things. Ideally, the teaching/learning experience should include seeing things, hearing things, and doing things.

During the second phase of the traditional correspondence study method, the student interacts with the instructor as he or she submits evidence of learning for evaluation. The primary form of this interaction is also the written word relayed from learner to instructor and back through the mail. Reliance on the written word may limit the communication process. An additional prob-

lem emerges from the physical separation of the teacher and learner, which often results in a delay between the submission of evidence and the validation of the learning that has taken place. This delay may mean that the learner will carry forward incorrect learning into the next learning task and/or that by the time the feedback is received, the learner might be so removed from the learning that it will no longer have immediacy. Furthermore, the second phase may contribute to the isolation of the learner, who often has little or no opportunity to interact in a face-to-face manner with either the instructor or with other students.

Given these problems of learning and teaching, the advocates of integrating electronic media and correspondence education looked at how to use media to improve these two phases of the teaching/learning transaction. In the first phase of correspondence instruction, some forms of electronic media appeared to offer considerable promise for motivating interest in the learning task. The compelling nature of media such as television and film was widely accepted. Thus, one role envisioned for the electronic media was as a motivational device that would encourage learners to undertake learning tasks and to complete them even when the media no longer were directly involved. No longer would correspondence instruction be solely dependent on the internal motivation of the learner. In addition, some electronic media appeared to reduce the reliance on the written word to convey meaning in the learning transaction. Here was an opportunity to use seeing and hearing and, in some cases doing, as well, to enhance learning. Learners could use television or films to observe experiments or to see real phenomenon in full motion, complete with color and sound, rather than relying on a written description. In the case of the teaching machine or programmed instruction, the learner might actually interact with the course content and receive immediate validation of the learning that had taken place.

The media also appeared to offer a variety of means for overcoming the delay in providing feedback and for reducing the isolation of the learner. Two of the electronic media advocated in this regard were the telephone and the computer. These media offered the potential for contact that could be much faster than

the mail and, in the case of the telephone, would enhance the written word as well.

Thus, combinations of electronic media, it was hoped, would vastly improve the learning effectiveness of the traditional correspondence study method during both phases of the teaching/learning transaction. During the 1970s and 1980s numerous efforts were made to enhance correspondence study with electronic media. Most were designed to address various aspects of the correspondence study method that were widely perceived as needing improvement. Electronic media pressed into service included the telephone, television, radio in the earlier years, audiocassettes, videocassettes, and in the 1980s, computers. Rather quickly, however, doubts about the net effect of such efforts began to emerge.

The Issue of Learning Effectiveness

As media enthusiasts began to attack the problem of heavy reliance on the written word in the first phase of instruction, they discovered that the electronic media also had limitations. As Wylie and Takushi (1980) noted,

[T]echnology can enhance learning by making content more diverse and more accessible, but telecommunications presentations still provide a rather shallow treatment of subject matter in comparison to the learner's self-directed study by other means, such as extensive reading or personal experience. (p. 93)

Critics of video-based courses have accused them of fostering the "trivialization of instruction," of promoting the "homogenization of instruction," and of infringing on the role of the faculty (Grossman, 1987, pp. 6 and 9). Others have noted that students do not actively engage in the learning process when the teaching is presented via television (Bates, 1984). In a similar manner, programmed instruction has been accused of oversimplifying content matters and, when used in conjunction with computers, of being restricted to drill and practice exercises, or to simulations that do not convey the full complexity of the content.

Attempts to use electronic media in the second phase have also met with limited success. The widespread establishment of tollfree telephone numbers provided an inexpensive means for students to establish direct communication with their instructors. The success of such enhancements is still limited by the availability of the instructor to participate in the communication. In addition, much of the evaluation material is still provided in written form and, therefore, remains dependent on written expression. As in traditional classrooms, there are often delays in returning evaluated material to the student. These limitations of distance education parallel problems in campus instruction.

Even more serious doubts about the effects of electronic media on learning were raised by research studies conducted during the late 1960s and the early 1970s. Based on his analysis of a project involving the integration of broadcast television and correspondence study at the high school level conducted at the University of Nebraska, as well as a review of similar experiments conducted elsewhere, Childs, who was an early enthusiast about the application of electronic media such as television to correspondence study, asked whether the media were having an influence on teaching/learning effectiveness (Almeda, 1988). In a 1973 address to the Independent Study Division of NUEA, Childs pointed to study after study that indicated no significant difference in learning effectiveness between approaches that included media and those that did not. In that address, he advanced Childs' first law of impact of method on the human organism: "In so far as general educational methodology is concerned, the brain doesn't give a damn" (Childs, 1973, p. 24).

From the perspective of two decades of continued experimentation, there is little to contradict Childs' conclusion. As Richard Clark (1983) noted in his review of research related to the use of technology in education,

Five decades of research suggest that there are no learning benefits to be gained from employing different media in instruction, regardless of their obviously attractive features or advertised superiority. . . . The best current evidence is that media are mere vehicles that deliver instruction but do not influence student achievement

any more than the truck that delivers our groceries causes changes in our nutrition. (p. 450)

This conclusion is reinforced by current research that confirms that correspondence study, as well as telecommunications-based distance education, is as effective as conventional education (Clark and Verduin, 1989; Whittington, 1987). The research does not indicate a clear advantage for one form of media or any combination of media over any other. In short, the idea that integration of electronic media with correspondence study would improve the teaching/learning transaction has not been substantiated. This conclusion contradicts one of the major reasons for advocating the integration of media and helps to explain why that integration has not proceeded at the pace originally envisioned. Had there been a dramatic improvement prompted by the integration of electronic media with the written word, it is likely that the integration process would have taken place much earlier. Lacking such clear-cut direction, the integration of electronic media continued on a much slower and more modest scale.

The Issue of Cost

A second factor inhibiting the rapid integration of the electronic media with correspondence education was the high costs involved. Ironically, as it turned out, much of the rhetoric of the media enthusiasts included claims that extensive media utilization in distance education would lead to lower costs. The vision championed was one of producing high-quality instructional materials, featuring the best teachers, that would achieve universal acceptance by institutions of higher education and that would be offered to large audiences of previously unserved or underserved learners. According to this scenario, the high initial costs of production would be more than offset by the size of the audience. The resulting economy of scale would lower the cost of higher education.

Experience demonstrated that media enthusiasts greatly underestimated the cost of course production when electronic me-

dia were extensively used. This was particularly true when the production models involved multiple media. For one thing, introduction of media greatly expanded the complexity of the course production process. Instead of a course production team composed of an author, who also served as the content specialist, and an editor (a model of course production followed by most correspondence study providers), the new production team might include content specialists, instructional designers, media specialists, print production specialists, and a host of others. One course production model advanced by planners at the University of Mid-America involved twenty-two people, each fulfilling a different function in the overall production task and an eighteen-step course design process (Van Kekerix, 1986). Furthermore, course production involving electronic media also required access to expensive equipment and facilities, particularly when high-quality broadcast television or sophisticated computer-based instruction was involved.

As a result, the early efforts to use electronic media encountered inflated production costs, often far beyond any of the predictions. This high cost was a factor in the demise of several early efforts to use media to open access to higher education. Even today, cost continues to be a significant barrier to integration of media such as television, where the cost of production can be more than \$2,000 per minute (Wiesner, 1987). Nor is television the only technology that is expensive. The design and production of computer-based instruction also involve equipment and design expertise that dramatically increases course development costs (Lauzon & Moore, 1989). Experience in the Open University indicates that it takes an instructional design professional two to four months to prepare a one-hour computer-assisted learning exercise (Scanlon, Jones & O'Shea, 1987). Interactive video has proved so difficult and expensive to produce that it remains beyond the reach of most universities and corporate-training divisions (Johnson, 1987). Even the more modest cost involved in the production of broadcast-quality radio production can be a barrier to full-scale integration (Takemoto, 1987).

The magnitude of the costs in using media deterred many correspondence study educators from large-scale integration. The expense involved proved beyond the reach of many correspondence study providers, who typically rely upon the income from student tuition or modest state appropriations to sustain their operations. As a result, many of the American efforts to use electronic media in distance education relied on funding from sources external to institutions of higher education, often from a combination of private and public sources at the national level.

A consequence of this reliance on external funding was an emphasis on the more glamorous attributes of the new technologies, often at the expense of the more traditional correspondence study approach. In fact, initiators of some of the more successful attempts to attract funding went out of their way to contrast the "new" approaches to the "old" approach of correspondence education, promising to improve the learning effectiveness of distance education. Leaders of such efforts often purposely distanced themselves from correspondence study providers because they did not wish to be viewed as just another form of correspondence study (Van Kekerix, 1986). Thus, one result of the high costs of using media and the consequent need for external funding was to isolate many correspondence educators from the highly visible efforts to integrate media on a grand scale.

Questions about the cost-effectiveness of integrating media with correspondence study inhibited the rapid advancement envisioned in the mid-1960s. Lacking the substantial funding needed to undertake these efforts on a large scale and denied involvement in securing major funding from outside sources—at least in the beginning—correspondence study educators did not play the role originally envisioned by Wedemeyer and others. Consequently, many of the larger efforts at integrating electronic media continued with minimal involvement by correspondence study educators.

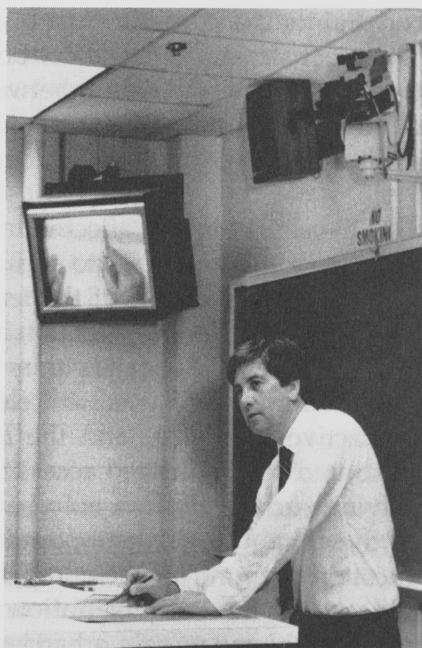
Cost was not the only barrier, however, for correspondence study providers. In many cases, the integration of electronic me-

dia involved a considerable, though often unrecognized, challenge to fundamental aspects of correspondence study concerning learner access.

The Issue of Learner Access

The high costs might have been acceptable if large numbers of learners had rushed to participate in the courses that used electronic media. Unfortunately, there was a less-than-overwhelming response from learners. The numbers of participants in many of the early courses were disappointingly low, casting serious doubts on the media's ability to open access to higher education on a grand scale. Several factors contributed to the lower-than-expected enrollments. Early experience with television delivery indicated that there were many more barriers to participation than simple access to programming. Furthermore, the barriers were individual student matters that were largely outside the providers' influence. These barriers included inadequate financial resources, inadequate time to devote to learning, and a variety of academic and learning problems (Walsh, 1975). An additional factor in the lower enrollments was the lack of a curricular focus in the early efforts to utilize electronic media. Too often the curriculum offered a smattering of courses that led to no particular educational goal.

Significant steps toward reaching the critical mass of students with a critical mass of courses have been taken in telecourse development. A substantial number of high-quality courses are now available (Miller, 1988). A major contributing factor has been the commitment of \$10 million a year over a ten-year period for the production of telecourses through the Corporation for Public Broadcasting/Annenberg Project. This commitment is complemented by the continuing efforts of other production units such as the International University Consortium, Dallas Community College, and Coastline Community College. Questions remain, however, about how to make these telecourses widely available (Miller, 1988). Although an increasing number of independent study programs are using telecourses to help meet the needs of distance learners, even these efforts are unable to reproduce a com-



An increasing number of independent study programs use television and other media to meet students' needs. When television courses are broadcast, many students videotape the programs for later review. Some independent study programs include video- and/or audiocassettes in their packets of course materials.

plete college curriculum, leaving it to the learner to patch together a course of study from several sources including the traditional classroom, correspondence study, and integrated courseware.

Beyond these factors, however, are more serious issues of learner access and control over the teaching/learning transactions. These issues, which are too often unrecognized, are especially pertinent to the discussion of integrating electronic media with correspondence study. Correspondence study is unrestricted by time and place limitations and allows the learner to progress at a rate determined largely by the individual. Therefore, it involves minimal interference with the other activities that compete for the learner's time and attention. Since the courses are available on a continuous basis, the learner may begin work at any time and pursue a schedule of his/her own choosing. Herein lies one of the challenges of the electronic media because integration of these media into the teaching/learning transaction usually has introduced constraints on the learner. In fact, it appears, as one author has noted, that "the more sophisticated the medium, the more

constraints the student must accept" (Pittman, 1987, pp. 33-34). These constraints often affect both phases of instruction and introduce a dynamic tension between dedication to meeting the individual time and place needs of the learner and the special constraints inherent in the technology (see Garrison & Baynton, 1987).

The elements that affect when, where, and how learning takes place may involve access to equipment and programming, or even the "user friendliness" of the teaching/learning activity. In some cases learners simply are not in a position to participate in a learning activity because they do not have access to needed equipment. Experiments with electronic media such as video text, interactive television, and the interactive video disk have been frustrated by the limited accessibility to such devices. Courses involving such media can only be accessed by only a small portion of the potential student population. A variation of the access question is found in the compatibility of computers. Despite the widespread market penetration by personal computers, compatibility problems remain a barrier to access. Unless the equipment is sufficiently widespread, a teaching/learning transaction that is dependent on specific equipment is unlikely to draw large numbers of students. Thus, a key factor in the flexibility of an integrated approach to correspondence study is access to the device or devices needed to pursue the educational activity.

Nor is the question of limited control over access restricted to matters of equipment. Access to programming may also involve meeting the place and time demands of the individual learner. For example, although virtually every family in the United States has a television and/or radio, thus overcoming the problem of access to the necessary equipment, the broadcast delivery of programs is often on a rigid schedule, making access to the needed programming difficult or impossible for the individual. Multiple broadcasts of the same program have been used on a staggered schedule to lessen the problem, but most distribution systems do not have sufficient broadcast time available to devote to such efforts. Thus, one of the factors in the lack of success for early experiments with combinations of correspondence study and broadcast media was the inaccessibility of the programming.

To some extent, these accessibility issues have been overcome through the widespread use of video and audio recorders, which allow the learner to record a program and replay it at a more convenient time. Nevertheless, there still are limitations on the number of hours of broadcast time made available for this type of programming on most distribution systems and some limits on the accessibility of the equipment itself. In some cases public radio and television stations, which are faced with the need to broaden their financial base by increasing viewer or listenership, are reluctant to dedicate broadcast time, especially prime broadcast time, to courses for small numbers of distance learners. They prefer to air public affairs and cultural programming (Takemoto, 1987).

An alternative tactic for solving the access problem is to include electronic media as incidental elements in the teaching/learning transaction. This approach is illustrated by efforts to make the electronic media an enhancement to distance learning courses that were, in fact, based primarily on printed materials. The printed materials of a course are often produced to stand alone, while the media are added as motivational or pacing devices. In such cases, learners quickly determine where the central focus of the course is and begin to ignore the supplemental material provided via the technology (Bates, 1984). Furthermore, there is no conclusive proof that such pacing efforts actually improve learner achievement, although there may be other legitimate reasons for wanting to pace students. Most of these reasons involve ease of administration (Shale, 1987). Media supplements are often expensive and students consistently rate them as less helpful than other course components (Strain, 1983). For the course provider this situation raises serious questions about the expenditure involved and the results expected. Issues of access and student control over the teaching/learning transaction must concern anyone introducing electronic media into the first phase of the teaching/learning transaction in distance learning.

The use of media usually introduces some constraints on the learner. In the second phase of distance education, one of the crucial elements in the communication process involves who initiates

the communications. Since distance learners have generally no control over the content of the first phase of instruction, providing considerable control over the second phase is highly desirable (Garrison & Baynton, 1987). In the second phase, a crucial element is the degree of availability of the instructor. For example, sophisticated electronic dialogue between the learner and teacher is possible through electronic mail and other devices. However, true dialogue is time-bound, requiring both to be on-line simultaneously. One can shorten the delay in the second phase of the transaction, but one cannot eliminate it without imposing considerable constraints on both the teacher and learner (Saba, 1988).

Even when the technology is widely available, there may be constraints on learner access to the programming. Traditional correspondence study continues to be among the most flexible forms of education; for this reason, it is unlikely to be displaced in the marketplace. The electronic media that have proved most compatible with correspondence study use technologies that have high market penetration and can be used on an individualized schedule. Among the best examples are audio- and videotape. Such media fit the basic philosophy of independent study, as do computer-based applications when the issue of compatibility has been resolved. These approaches allow the learner considerable control of the teaching/learning transaction.

One of the electronic media applications that offers great promise as an enhancement to the second phase interaction is the ability of the learner to access a computer via telephone and modem at any time and to receive immediate validation of learning. Although the interaction involves predetermined limits on the choices available to the learner, this approach offers the learner control over the time and the place of interaction, immediate feedback, and, in many cases, more complete feedback than might be received from a live instructor. Such interactions must be very carefully designed; therefore, they increase the cost of course design. In addition, the learner must have access to the appropriate equipment and software.

The issue of learner access provides some interesting insights into the problems of integrating electronic media and correspondence study. The central question is, How does the introduction of electronic media influence the degree of independence of the learner? The greater the control of the learner over the media, the more closely the technology fits the goal of meeting the needs of learners. The independent study provider must consider the accessibility of electronic media or risk making a fundamental change in the nature of educational product, which has traditionally been directed toward the individual learner.

Conclusion

After two decades of innovation in integrating media, independent study educators continue to debate the relative merits of various types of electronic media and to experiment to find the proper role for such media within the independent study method of instruction. Although the calls for abandoning the print base of distance learning appear to be a thing of the past, correspondence educators continue to find it necessary to defend the method against attack by the advocates of the new forms of telecommunications who take advantage of the method's so-called "image problem" (Almeda, 1985, p. 198) and who regard telecommunications-based distance education as "an extension beyond the limits of correspondence study" (Barker, Frisbie, & Patrick, 1989, p. 23). As correspondence educators continue to speak out for independent study's rightful place in the lexicon of distance education, they must also continue to seek those electronic media that offer a comfortable fit with correspondence instruction and to exploit the capabilities of the new and emerging technologies.

The current efforts to integrate electronic media with correspondence study must still deal with issues of effectiveness, cost, and learner access. It is time to transcend the seemingly endless debate about the relative effectiveness of one form of media over another and to recognize that questions about effective educational methods involve beliefs about human nature and the purpose of education—questions that do not lend themselves to empirical

proof (Hayes, 1990). This suggests that if certain beliefs about the nature of higher education are held in high regard within an institution, it may be necessary to fashion a delivery system that accommodates those beliefs, although research-based results may not support it. To ignore such beliefs may deny learners access to the educational activities they desire.

The issue of cost must be approached as a question of how to manage innovation and control technology. How can the organization remain creative, innovative, and competitive without losing control of cost and human resources (Murgatroyd, 1990)? This requires considerable knowledge on the part of the independent study educator, not only about finances, but also about corporate values and competitive strategy.

The access and control issues suggest that the independent study provider must also know a good deal more about the potential learner audience, including access to equipment, access to programming, and the degree of control these individuals may wish to have over the teaching/learning transaction. Some students would be willing to trade some control over time and place for more immediate interaction that is not based on the printed word. Others may prefer a print-based approach. Introducing electronic media in a variety of forms into the teaching/learning transaction gives learners a wider range of control over the teaching/learning transaction. The result should be a rich diversity in the forms of distance education, all of which are needed if the dream of universal access to educational opportunity is to be realized. In looking toward the future, the challenge is not in identifying what new technology will revolutionize independent study. Instead, the challenge for independent study providers lies in using those media that meet the needs of learners and in providing ways for the learner to make informed choices throughout the teaching/learning transaction (Locatis, 1987).

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Chapter 7

Support Services for the Independent Study Student

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To be successful, independent study programs must respond sensitively and efficiently to student needs. Albrecht and Zemke (1985) described the challenge independent study programs face as they attempt to meet student needs. Citing John Naisbitt's "high-tech/high touch" concept, they observed: "The more we are faced with high tech [or, are distanced from the professor and staff], the more we want high touch. The fewer contacts we have with the *people* of an organization, the more important the *quality* of each contact becomes" (p. 8).

Ensuring high-quality contacts is especially important for independent study programs. Virtually all of these programs provide, largely from their own department, services offered to resident students by a number of separate campus departments—for example, registration, record keeping, sometimes printing and bookstore services, and advising or counseling. Thus, independent study departments need employees with expertise in a broader range of service functions than is provided by most other campus departments.

Types of Services

Responding to student needs involves four major functions for independent study departments: (1) communicating well to attract students to the program; (2) offering students appropriate counseling; (3) motivating students to begin their courses promptly and to persevere to completion; and (4) managing records of their progress.

Attracting Students

Most independent study programs in the United States are expected to be somewhat self-sustaining. Thus, substantial attention must be given to attracting students.

One of the most important services extended to students is communicating important information about independent study, particularly about the benefits and opportunities the field can provide in the pursuit of their educational goals. Many students, both on campus and off, simply are unaware of nontraditional educational options such as independent study.

Independent study programs that have created careful marketing plans typically follow a five-step cycle: (1) in-depth analysis of student audiences; (2) development of a communication plan; (3) production of effective advertising pieces; (4) tracking responses and feedback; and (5) evaluation of the resulting information.

The most effective marketing communication delivers information on the level and in the language of the recipients. That happens only when the department knows the recipients' needs. For independent study programs, this means fully understanding the student audiences they serve.

Analyzing the demographics of independent study students who have already enrolled is the first step in achieving this understanding. These data include students' age, occupation, rea-

son for enrolling, and gender. These data provide useful general student profiles. In order to understand why students enrolled in a course and the feelings they have about it, however, it is necessary to go beyond quantitative-data gathering to qualitative methods of asking open-ended questions and intensive listening. Doing so generates meaningful information to use in developing communication plans.

Preparing communication plans, the second step of the cycle, requires independent study staff to answer these questions: (1) Who is our audience and what are their needs? (2) What do we have to offer them and what benefits will these services provide? (3) When will they be most inclined to listen and take action? (4) What media should be used to deliver the message and how often should the message be transmitted?

Creation of an effective communication plan enables independent study programs to take a specific direction in their communication and to create individual advertising efforts that support their plan.

The execution of each advertising effort—a catalog, an advertisement, a commercial, or simply the conversations independent study team members have with inquiring students—is based on good principles of advertising: (1) it communicates a clear message efficiently; (2) it identifies *program or course attributes* and the benefits those attributes offer; and (3) it gives information to help the student make a decision or take action. The most important factor in communication is the content, not how that content is decorated.

Effective communication requires gathering and listening to feedback. This means implementing a tracking system that will help independent study departments monitor responses to the messages they deliver. High numbers of responses to carefully crafted questions indicate effective communication and low numbers indicate a need for adjustment. Tracking requires accumulating and evaluating information on a continuing basis. This infor-

mation will tell independent study staffs whether they are really meeting the needs of the audiences they are attempting to serve.

This cycle provides an important service. Informing potential students about independent study gives them an additional opportunity and choice in pursuing their educational goals. It also provides the independent study department valuable information to serve future students even better.

Counseling

The kinds and amount of counseling available to independent study students vary widely among institutions. Many students need assistance in choosing a course, in deciding how to meet their educational goals, or in selecting a career. Most programs offer only general counseling assistance, such as helping students choose an appropriate course based on discussion of their needs and interests. For specialized counseling functions, such as providing individual assessment of student aptitude or interests by using standardized tests, most independent study departments refer students to their campus counseling or testing center.

One useful study identified previously unrecognized factors in helping independent study students progress in their courses. These included assisting students in assessing their time commitments, in planning realistically the independent study experience, and in disciplining their time to complete courses (Gatz, 1985/1986).

Many adult independent study students have been away from school for several years and are unsure of their study skills. Some students need assistance in adapting their study skills to the conditions and constraints of an independent study course. Because Americans are used to learning in groups rather than independently, most programs provide students suggestions about studying successfully in independent study courses.

A notable example is *Making the Grade* (Sammons & Kozoll, 1986), a how-to guide developed by the University of Illinois at Urbana-Champaign. This booklet briefly describes key factors in studying successfully alone, provides illustrations of implementing study strategies, and includes a few examples of how students used the ideas in their courses.

Programs with external degrees—which were offered by twenty institutions during 1986–87 (NUCEA, 1990)—must provide sufficient counseling to help students make effective decisions based on their career goals and preparation. Some programs include aptitude and other testing, as well as career counseling.

Departments offering high school courses are a special case. Most high school students who take independent study courses can obtain effective counseling from their school counselors. The school *counselor*, however, needs special service from the independent study team to assure that students meet graduation deadlines or other goals. Some schools meet this need by issuing periodic reports to high school counselors, listing the specific progress by course for each student from the counselor's school.

Motivating Students

Course materials can substantially affect the work of independent study team members who deal with student services. Unclear or incomplete materials may lead to increased queries or complaints.

In a more subtle way, factors such as course workload can also have an impact. Faculty authors are tempted to include in their independent study course all they ever wanted to cover in their equivalent campus class. Most independent study programs try to control this by limiting the number of lessons in courses. But it is still tempting to many faculty to lengthen individual lessons to compensate for the limited number of lessons.

Brigham Young University initiated a program in 1971 in which the number of lessons permitted remained the same, but the *amount of work* to be graded by faculty was reduced to approximate the amount of work reviewed for the same course on campus. The independent study student's workload was to be reduced to equal what faculty graded for resident students. In many courses only one-third to one-half of the lessons contain submitted work. In the remaining lessons, students check their comprehension through self-tests. The content of these nonsubmitted lessons is often synthesized in work submitted with other lessons and is always covered on examinations.

Many programs encourage students to plan a specific study schedule for completing their course. The course study guide may include a day-of-week with hour-of-day chart on which students can specify when they will study. Frequently students are encouraged to determine a target date by which they need or wish to have completed the course, and then to work backwards to the present, to determine how much time they should permit for each lesson.

Motivation can be facilitated when students receive course materials promptly. Students who enroll at an independent study office normally receive their materials at the time of enrollment. Independent study programs take great pains to ship, usually within 24 hours, course materials to students who register by mail. The independent study team must handle fees and paperwork efficiently and accurately to accomplish this.

Because student motivation suffers most when there are delays in the return of graded work, the rapid turnaround of submitted lessons and tests is crucial. Some students, including those in residence programs, experience anxiety about the quality of their work. If independent study evaluation is delayed, they may reduce that anxiety by putting off working on the course.

Some programs motivate faculty to grade student work promptly by using a sliding-scale system of compensation. For example, lessons received in the independent study office within

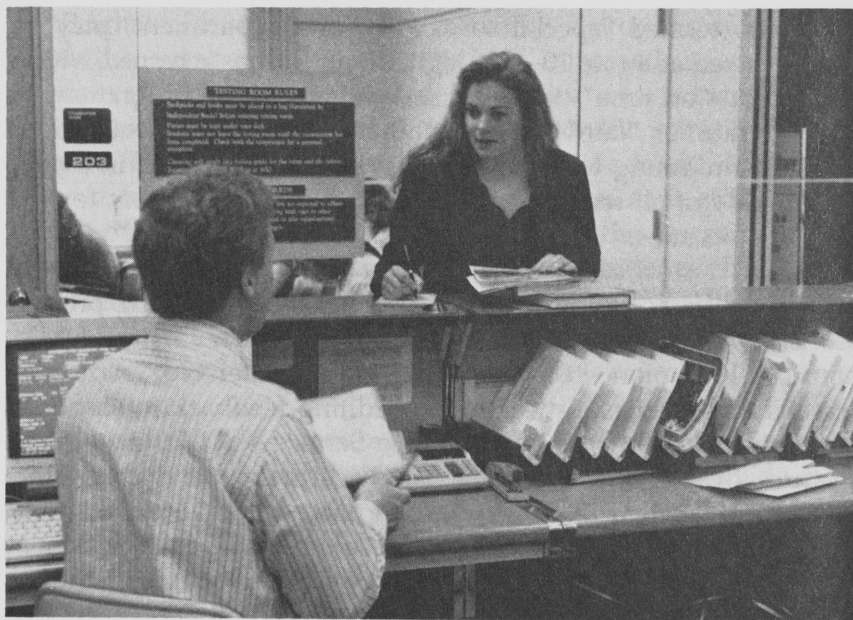
48 hours (termed "special service" in one department) may be compensated at a rate 10–15% higher than lessons returned within the typical "on time" period of seven days. Many programs pay a lower rate for "late" lessons—those returned after seven days. At Brigham Young University, this system has resulted in a consistent 85% of all lessons being returned within 48 hours for the past two decades.

In a different approach to the problem of providing prompt feedback to independent study students, the University of Missouri in 1974 pioneered the notion of computerized grading of lessons and tests as a means of expediting feedback to students. Known as Computer-assisted Lesson Service (CALs), the system features overnight, computer-graded instruction and computer-generated, detailed feedback on each missed item. Students with access to on-line computers, which are often available in education centers or high schools, can receive feedback within minutes. This service is both effective and popular with students. The Defense Activity for Non-Traditional Education Support (DANTES) states that "the CALs program has shown a *significant increase in student participation and course completion*" (1989).

Finally, most independent study programs send periodic reminders to students who have not submitted work since their registration. Typically, reminders are sent at three-, six-, and nine-month intervals to students who have not submitted work during those segments of their enrollment time. And about one month before course expiration dates, almost all departments send notices to students who have not completed their course.

Record Keeping

Processing student enrollments and coursework efficiently and accurately reduces delays in returning lesson work and grades. To successfully manage enrollment and record keeping, it is important to provide students clear and simple directions on how to find answers to questions and how to proceed—from enrollment, through submitting lesson work, to completing examina-



Independent study support services assist students in selecting and completing courses, mastering study skills, and transferring credit. New technology—such as barcoding systems, electronic and voice mail, FAX transmittal, and computerized record keeping—has significantly improved communication.

tions. Clear, detailed instructions can improve communication between independent study professionals and students—in person, on the phone, and in letters.

Efficient record keeping is labor-intensive. In most programs, students send their assignments to the independent study office, where they are logged and then forwarded to the instructor for grading and comments. The instructor then returns the graded work to the independent study office. The two-way logging provides two types of control: data for faculty pay, and documentation in case of recalcitrant faculty or lessons lost in the mail.

For decades, such record keeping was mostly manual. Staff used typewriters to create a card for each student, rubber stamps to record the date on which lessons were received from and returned to the student, and cardex trays to store current students'

cards. Using computers for record keeping in university-affiliated independent study departments was initiated in 1970 by Brigham Young University, and its software has been adopted and implemented by several other institutions. Many departments now use computers to help keep student records. Most of the larger departments access mainframe computers or use the newer mini-computers with equivalent processing power. Their computer programs manage all student record keeping—enrollment, payment of fees, lesson submission and grading, faculty payroll, and credit posted to transcripts. Smaller programs often tie in to a campus mainframe or have their own personal computers, which prevents them from using the computer for the full range of record keeping services. A number of independent study programs have experimented with various means of improving the efficiency and accuracy of keeping student records. The following examples show the breadth and ingenuity evident in the field.

To expedite student enrollment and lesson processing, several institutions now use barcode systems to enroll students, process lessons, and even to record grades. As students register, a unique barcode is assigned. In some programs this barcode merely identifies the student; in others, the computer program ties the student to the specific course. In either case, when the barcode is scanned, the computer brings up the student's record. At the present time, at least three institutions have implemented barcoding: Pennsylvania State University, Texas Tech University, and Brigham Young University.

Organization

Historically, independent study departments have used a vertical-linkage system of organization (Daft, 1986). Employees are assigned specific tasks to accomplish and, if all sections function properly, student needs are met. However, some routine tasks such as processing enrollments and lessons, although necessary, can be tedious and unfulfilling to the team member. When functions are tedious, team members are less motivated; thus, the quality of service to students may decrease.

Feeling pressure due to staff turnover in an expanding program, Texas Tech University hired a faculty consultant to analyze its program and recommend remedies. The result was a move away from the standard organizational structure based on the compartmentalization of service functions, in which certain employees deal with enrollment, others process lessons, and others answer student inquiries. This type of organization was replaced in 1985 by a "regional" approach, in which student services employees provide *all* of the managerial services needed by students residing in their particular region. Each enrolls all students from the assigned region, sends course materials to them, processes their lessons, and responds to their questions (except those to be answered by faculty). In this system, students and their counselors know precisely who to contact with a question or problem, regardless of its nature. High school "regions" are determined geographically in this system, while college students are assigned alphabetically.

The complexity of most independent study operations requires effective, ongoing communication among the various sections of the department if student needs are to be met. Feedback about course effectiveness—received at the counter, over the phone, or through the mail—must be provided to those who work with faculty authors. Feedback that affects the advertising effort must be relayed in a timely manner to those responsible for marketing; therefore, harmony and positive working relationships among sections of the department are important.

Program complexity also demands that the department have an effective training program for new employees and that program administrators have "staying power"—the ability to attract and keep talented people who become devoted members of the independent study team. The use of "job aids" is an effective and convenient way to remind team members about the critical segments of their work. Job aids, used extensively by professional trainers, are reminders of key steps in a team member's work. By providing both the stimuli and responses appropriate to the work situation, job aids decrease the amount of detail the person needs

to recall from memory. They are particularly useful for new team members and for positions with detailed procedures (Harless, 1986).

As computer programming has become more sophisticated, many software programs have been designed for independent study programs which contain menus, prompts, and help screens to assist newer team members or those filling in for others on leave for various reasons.

Further, universities typically have training and development offices that can be helpful in training, or upgrading the training of, the independent study team. The training and development professionals in these offices can help campus offices effectively serve students' needs. When team members are well trained and their contributions are valued, they are highly motivated. Positive attitudes help generate high-quality service that meets student needs.

Future Trends

Just as word processing has changed the production of study guides, call processing is changing the way students use the telephone to access the various parts of the independent study office. Calling the main number provides a "menu" of stations that can be reached directly by dialing one more digit. In this manner, students can quickly reach the person most able to meet their particular need.

Facsimile (FAX) machines have become increasingly popular in recent years, and their use will have significant ramifications for independent study departments. One issue to be addressed is how to use the FAX machine's ability to provide rapid service to a student, while assuring the academic integrity of lesson materials and examinations. Another problem is how to ensure the student's privacy rights if access to a machine at either end is shared by others.

Electronic mail systems also provide, via computer, a method for quick interchange between student and instructor. The student can send an "electronic message" asking questions about topics of study, and the professor can respond in the same manner, each communicating at a personally convenient time.

Independent study team members involved in improving service to students must focus on accurately identifying the independent study audience and its needs. The annual report of the Independent Study Division of NUCEA shows, year after year, a continuing preference for text-based courses by a majority of independent study students. Successful programs must discover a balance between meeting that ongoing preference and preparing for a future generation, bred on a steadier diet of television, which may prefer some other medium or mix of media.

Summary

Much has been written in recent years about service. For example, Albrecht and Zemke (1985) identified three basic types of service that independent study programs try to provide: "help me" service, "fix it" service, and "value-added" service.

Independent study programs engage in "help me" service when they provide courses needed by students to meet their academic, career, or personal needs—courses that are well written and supported by effective registration, counseling, motivational, and record-keeping services. "Fix it" service deals with things that go wrong in the system—lost mailings, faulty pages in the syllabus, or recalcitrant faculty graders. And "value-added" service occurs in independent study work whenever a team member goes beyond what can reasonably be expected by students: making a follow-up call to a student to verify that a given attempt to meet the student's need was indeed helpful or drawing a map of the campus or town for a student unfamiliar with the area. "Value-added" service occurs when team members provide *student-focused* service, when they treat students as they themselves would like to be treated.

This basic "do unto others" concept is at the heart of what we mean by "service." Our culture often thinks of service as spontaneous, a personal attitude, something that can only be delivered one-on-one. This in turn has led to decades of "pep talks" about service to staff members at every level of every organization. But the acquisition and improvement of service attitudes has never been fully incorporated into the training programs of most organizations. That is changing today. It is possible for "value-added" service to permeate every segment of an independent study program.

To restate Albrecht and Zemke's observation cited earlier in this chapter: "The more we are faced with high-tech [distanced from the professor and staff], the more we want high-touch. The fewer contacts we have with the *people* of an organization, the more important the *quality* of each contact becomes" (p. 8).

In whatever means an independent study program uses to attract students, in whatever counseling and motivational services it offers, in whatever technologies and organizational systems it uses to meet student needs—there is always the inherent promise of an excellent educational experience. Independent study programs must commit themselves to matching this promise with performance.

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Chapter 8

The Education and Training of Independent Study Professionals

Harold Markowitz, Jr.

Independent study is not a recognized subset of American education, and preparing professionals in this field has not become a focus of any college of education in the United States. The field is too minor on the national scene, and the needs of practitioners too general, to merit separate status.

Nevertheless, professional status and opportunities for professional development have grown significantly, particularly over the past 20 years. Independent study in the 1990s operates in a new context, influenced by the focused activities of large distance education institutions abroad and by the separate efforts of distance education enterprises in the United States.

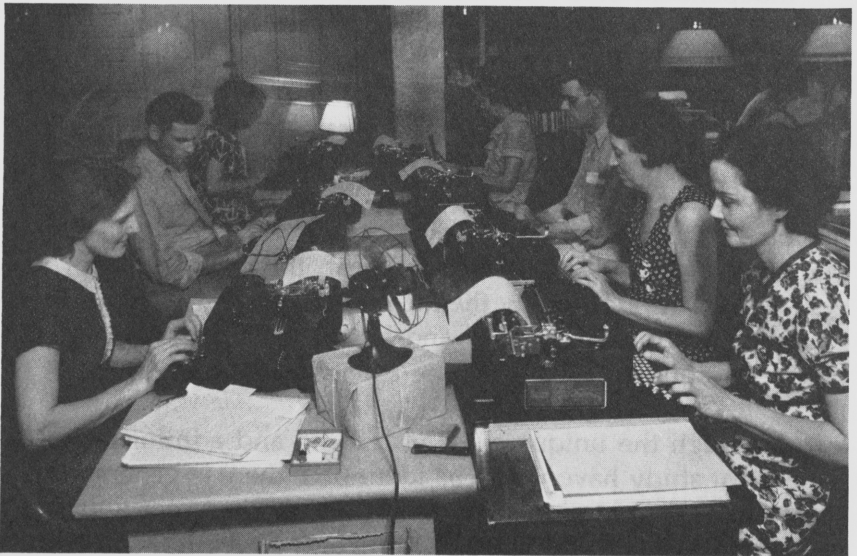
Although the unique skills of leading and administering independent study have yet to be identified, there is general agreement that new technical and managerial skills are required. All practitioners benefit from the growing and varied options created to meet this need. Specialized conferences and meetings, new opportunities for reading and study, stronger frameworks for pro-

fessional networking, and a growing variety of personal development courses envelop the field. The demand for skill building has helped foster abundant education and training opportunities, and professional tasks are being shaped as new skills are acquired.

Examining Context: Past Practice

Gayle Childs (1987) remarked that in earlier years staffing a correspondence study office was a clerical task:

While the matter of slow growth of professionalism is a legitimate matter for concern, it is not one which is difficult to understand. . . . When extension units were formed . . . instruction was the province of the colleges and departments and the role of the extension division was to provide administrative and clerical functions. . . . Responsibility for overseeing the [correspondence] operation was often placed in the hands of persons with clerical backgrounds, and titles such as "Correspondence Secretary" or "Secretary in Charge of Correspondence Study" reflected their duties. (p. 3)



In the early years staffing a correspondence study office was a clerical task—from the "correspondence secretary" who managed the office to the course production staff that laboriously typed the study guides.

By the end of the 1920s some professional educators were entering the field of correspondence study, and this trend continued through the 1930s and 1940s. The growth of high school programs accelerated the need for professionally qualified staff as increased responsibility for instructional decision making came to the correspondence department. By 1950 correspondence study was well established in American universities, though acceptance by the academic community was still a major concern among correspondence educators (Childs, 1987).

Correspondence Instruction in the United States, a landmark publication of 1968, was based on a national study of correspondence education in the years 1964 to 1966 (MacKenzie, Christensen, & Rigby, 1968). In that study the authors noted that university correspondence program directors ranked among their most pressing needs the "professionalism of correspondence administrators and staff members" (p. 84). They cited "a few attempts" at raising salaries and improving the image of correspondence education, and urged that professionalism be encouraged "if correspondence instruction is to continue to fill its personnel needs in a competitive market" (p. 88).

In 1987 Michael Moore, a prominent scholar in the distance education field, interviewed Charles Wedemeyer, whom he described as having introduced "the prototype . . . for the open education movement that swept the world in the 1970s and 1980s." Asked for his observation on careers in distance education, Wedemeyer replied,

Since the formation of the Open University in 1969, there is a new ballgame being played in the world. This was the first institution of its kind that offered professional careers of high prestige in the design and development and application of learning systems that were not focused on face-to-face groups. . . . Now some countries have taken up this challenge and are producing distance education administrators as well as distance education academics and other kinds of distance teaching specialists. (Moore, 1987, p. 63)

Most American observers in the field today would agree that the status and the qualifications of the professional staff—a term

whose widespread use is in itself a sign of progress—have risen in noteworthy ways in the past 20 years. There are increasing opportunities for development as well as a shared sense of its importance. As Markowitz (1990b) observed,

There is general agreement that the development of mid-level professional staff in distance education is accepted as a responsibility of senior management as well as of the individual. Various approaches being followed include graduate degree work, noncredit courses by distance teaching, and attending professional meetings, as well as a variety of supplementary methods such as assuring appropriate periodical subscriptions. (p. 64)

In the literature of 20 or 30 years ago, it was commonplace to note that correspondence study or independent study lacked a cadre of professional educators in leadership positions; in evidence, it was pointed out that there was little research and few scholarly articles and books in the field. In recent years there has been vastly more research, often resulting in theses and dissertations, and a comparative explosion of books and articles. Practitioners in independent study, as well as those in the larger province of distance education, have developed a body of literature and have made considerable strides in developing theory, which surely is evidence of serious scholarship as well as a source of professional development for others.

After a century of independent study, though the field is developing, it falls short of its goal of equivalent professional status in many ways. As in all its past, it is heavily dependent on an influx of individuals educated and experienced in other fields for its leadership. Conversely, many of the individuals who would be cited as the leaders in the field of independent study in one decade are found to have moved to (often having been promoted to) other fields in the next decade. Independent study provides a satisfactory midlevel professional post for many, while providing a lifelong professional focus for few. Though the academic preparation of entering professionals often is excellent, much of the relevant new research and literature is the work of individuals who are not closely involved with an independent study program or who, following graduate study, find employment elsewhere.

Professional status and opportunities within independent study have developed along strongly positive lines, more so than might have been hoped just 20 years ago. The explosion of popular, inexpensive technology has fueled the trend to base courses in a combination of print and electronic media. Many see in this trend opportunities for greater influence as well as greater effectiveness. Diversification, many think, may define our professional future as well as the staffing needs of our programs (Markowitz, 1988).

Making Commitments: New Opportunities for Professionals

Just a few years ago, among leaders in American independent study it was a commonplace remark that although the number of professionals in the field was growing, leadership in the field remained in the hands of only a few. Certainly no more than a dozen individuals accounted for the preponderance of the field's active professional leadership.

Three recent trends have modified this situation. First, as the professional ranks have expanded, the field has attracted a greater number of highly qualified and active individuals. Second, recognizing the need for broader participation, a concerted effort was made by the established leaders to encourage and support stronger participation by midlevel professionals. And third, participation has increased as the opportunity for attending relevant professional meetings has developed and the body of professional literature and publishing opportunities have expanded.

Though some full-time faculty are employed in independent study programs, this is a rarity. Most faculty in American independent study work on a part-time basis, being paid by the assignment graded. They are assumed to be dedicated professionals in their areas, and those with extended experience often are thought of as being deeply committed to the concept of independent study. Nonetheless, faculty are at best considered to be on

the fringes of professional practice in continuing education, and never at its core. The expectations placed on them by independent study department chairpersons reflect this value. In a recent three-round Delphi survey of administrators, with 63 of the 72 independent study institutions in NUCEA participating, the top value in desired teacher competencies was promptness in returning graded assignments (Mayton, 1989). The valuing of professional participation (as shown by association membership, knowledge of current thought and literature, publication or presentation) was not apparent, if it exists at all.

Leadership and professional status in independent study, then, is currently in the hands of generalists and administrators. In large measure, this situation grows out of the fact that the NUCEA, the central professional organization of those in independent study, is an association of institutions (hence the focus on administration) rather than one of individuals (Markowitz, Almeda, Logan, Loewenthal, and Young, 1990). In years to come, it seems probable that any significant growth in the professional group will occur through acknowledging the professional status of faculty members and of specialists in technical and support areas.

Viewing Patterns: Distance Education Comparisons

Are patterns in the United States unique, or is the outlook of professionals in American independent study a reflection of distance education trends throughout the world? It is not at all unusual to encounter the thought that this is an international field, whose literature brims with references to research and experience in other nations that applies to the situation here. Though internationalizing influences are strong, powerful forces make the situation in the United States different from that found elsewhere. Most significantly, American programs typically operate as minor activities on the campuses of traditional institutions, and national educational priorities place little emphasis on learning at a distance.

Keegan analyzed the staffing patterns of universities throughout the world which were devoted wholly or largely to distance teaching, as well as "mixed institutions" such as independent study divisions within conventional American universities. He concluded, "The entry of large numbers of full-time staff in the distance teaching universities [those devoted exclusively to distance education] has been one of the striking features of distance education in the last decade" (1986, p. 181). Larger staffs open new possibilities for the development of specialized focus in distance teaching, support, and research, he found. This influx of professional staff was not observed by Keegan in mixed institutions of the United States. Markowitz (1988) noted that a critical mass of full-time professional staffing is required to provide internal opportunities for many staff development efforts, and that the typically small staffs of American independent study programs foster reliance on external development mechanisms.

For the foreseeable future independent study will probably continue to operate on a comparatively small scale, and the sources of the professional staff, as well as much of that staff's professional development, will be from other fields.

Accepting Responsibilities: Development as Organizational Task

Though there is widespread agreement in continuing education on the value of staff development, there is no general agreement on the specific professional development needs of continuing educators. Simerly (1981) cited several studies that have attempted to determine the skills and competencies required of continuing educators; it is consistent with the researchers' inability to identify universal needs that he concluded that the task is one of fitting development efforts to the needs of the organization as much as it is one of individual development.

Responsibility for that development was debated in the 1980s, with some holding that it is the organization's task, and others

seeing it as the job of the individual. In G. J. Andrews' book *Principles of Good Practice in Continuing Education* (1984), the professional development of employees is cited as management's responsibility. A year later J. W. Apps' book *Improving Practice in Continuing Education* held just the opposite, saying each practitioner has primary responsibility for his or her own professional growth. The structured and the unstructured views are well illustrated here: the former book sees effective continuing education as both the product and the source of continuing educators' achievement, whereas the latter book does not even cite continuing education as a means of professional development. Such diversity of opinion in publications aimed at improving practice is testimony to the lack of accepted standards for the development of practitioners.

Houle (1980) leaned toward the unstructured view. One of his basic ideas is that the responsibility for learning rests with the individual. Though he endorsed an institutional climate that formally encourages and provides for professional education, he noted that the institution's motivation in doing so is not sensitivity to need but desire to improve services or products. Others assume both organizational and individual needs are served by staff development, but internal programs are only found in large continuing education organizations. Smaller organizations meet their needs through external sources, such as sponsoring conference attendance or subscribing to journals (Strother & Klus, 1982). These views suggest a middle position between the structured and the unstructured, with the institution contributing to professional development to the extent that its goals are served and its means are sufficient, and the individual being responsible for making the most of the limited resources available in the typical small program.

Selecting Skills: Identifying Appropriate Proficiencies

By the 1990s, several factors combined to produce an expanding and well-qualified cadre of midlevel professionals and man-

agers in American independent study. Three factors seem to have had an especially significant influence. First is the increased commonality of advanced degrees in all educational activities, which has resulted in much greater formal preparation by those in independent study. Second is the increased number of professional positions available. This has attracted talented individuals from other fields, encouraged movement of people between programs, and opened career-broadening opportunities within programs. Finally, there are the increased demands and expectations of individuals in the field for participation in specialized meetings and professional interaction, which has promoted the acquisition of specialized knowledge and skills.

"The growth of the professional independent study staff is an especially significant trend," Markowitz noted, resulting in programs that are "better managed, and better attuned to the goals and values of our universities" (1990b, p. 90). With this, there is a growing collegiality among independent study staff members which is built on the perception of shared professional status and interests. The 1980s saw explosive growth in the availability of journals and books that address the concerns of independent study and distance education. Not only did this open new opportunities for individual self-improvement, but it also encouraged communication and shared values on a national and international scale. In the United States, research and publication have been encouraged and the professional environment of American independent study has been altered in a way that would have been difficult to envision when many current leaders began their careers.

The professional environment of the 1990s is more receptive, responsive, and constructive than in the past. It is this environmental change, rather than widespread conviction about the need for specific new proficiencies, that has led to increased opportunities for building professional skills.

Knox (1979) reviewed the literature on the proficiencies required of continuing education practitioners and concluded that new requirements for both personal growth and staff develop-

ment have been created by the growing size, visibility, and expectations of their work. He made a good case, but like the literature he consulted, he drew prescriptive conclusions. There is little in the literature that could be viewed as an objective study of the need, with identification of the knowledge or proficiencies that characterize the most successful people in the field.

In fact, all of the efforts at building proficiencies—and several good annual or biennial conferences now available—have necessarily used the resources and speakers at hand to address speculated needs. Practitioners have as guidance neither a record of the career paths of current leaders (assuming the preparation of today's leadership is relevant to tomorrow's environment) nor an analysis of patterns of professional development actually being followed at this time. There have not been cooperative efforts by proprietary, collegiate, and corporate institutions to identify and provide appropriate training.

Everyone who writes or speaks on the topic holds that those in continuing education, which includes those in distance education, ought to work on developing career-enhancing skills. Few, however, are prepared to fully accept the prescription of another authority.

Addressing the curriculum choices that must go into a graduate program in adult education, Galbraith and Zelenak noted that graduate programs in the field "are directed at the enhancement of the realization of individual strengths and therefore are focused on the development of technical and practical skills" (1989, p. 129). They concluded that such graduate programs do not reflect widespread agreement on content nor are they clearly differentiated between masters and doctoral study. At present, graduate programs in adult education reflect the emphasis and ideologies of the institution in which they are housed. Thus, the best and most relevant preparation is arguably whatever one wishes it to be, since the topic is at present more noted for its well-stated opinions than for its well-established facts.



Morris Sammons addresses participants in the professional development workshop "Developing Total Independent Study Programs" at Lincoln, Nebraska, in March 1990. Annual workshops sponsored by the NUCEA Independent Study Division focus on issues of common concern.

This is as true in career development workshops as it is in graduate programs leading to degrees in adult or continuing education. Searching for some definition of the core knowledge of adult education, Griffith analyzed the views of recognized authorities. Though he found some agreement on the categories under which courses should occur, he concluded "it would be a rare graduate program that provides a thorough treatment of the lot" (Griffith, 1980, p. 209). Discounting shared educational background, he sought other evidence of the professional status of adult educators—and observed only weak participation in professional associations and a growing trend of allegiance to a part rather than the whole of the field. Ten years after Griffith's research, the forces of change continue to shape the field, and agreement about its central elements seem as remote as ever.

In independent study, significant remnants of preindustrial education are being cast aside as centrally prepared course materials and more substantive use of nonprint media cause us to rethink many of our basic values. We are beginning a period in which several clear trends are eroding past concepts of indepen-

dent study, blending our efforts with the broader field of distance education (Markowitz, 1990a). The trends include increasing applications of distance education, greater availability of technology to supplement traditional media, increasing independent access to media by students (relying less on schools and teachers to present new information), growing costs of education in all formats, and expanded professional staffing and management of distance education.

It is neither the perception of shared status nor the possession of a well-developed body of knowledge that practitioners see as central to their professional identification; professional development in independent study has focused on building group cohesiveness, reinforcing basic values, and sharing information on closely related experiences.

In tracing the origins of the Graduate Diploma in Distance Education offered by the South Australian College of Advanced Education, Mitchell cited testimony and examples of demonstrated need for specialized staff training programs, both nationally and internationally. Created to prepare individuals for administrative, teaching, or support roles, the program description outlines the need for special skills in organization and management, particular forms of support for students, and different kinds of course design, preparation, delivery, and teaching from that of face-to-face instruction. The resulting postgraduate program, offered by distance education, is presently available to those outside Australia who qualify to enroll. Whether a postgraduate program would be preferred to other alternatives by American independent study staff is an open question.

In addition to conferences and in-house programs, independent study is an available but underused medium for continuing professional education. The European Home Study Council has introduced a series of courses by distance education on distance education, featuring prominent European authorities addressing significant topics. The courses lead to a certificate, but not to a degree.

Building Skills: Staff Development Programs

Today, both the leaders in continuing higher education and the individuals working under them assume that part of the leader's role is identifying opportunities for staff professional development. The expected role of professional employees, of course, is to make the most of the available opportunities. The value of this process hinges on the extent to which there is a shared perception of need, a similar vision of mission and function, and a willingness to devote time and resources to professional development.

In valuing the development of professional staff and in assigning shared responsibility for it to both management and the individual, independent study reflects the values of contemporary organizations throughout our society (Caruth, Noe, & Mondy, 1988). Gessner (1987) noted that as increasing numbers of individuals enter the field of continuing education from fields other than education, they often are found to lack the professional preparation that will contribute to career success. To illustrate the universities' acknowledgment of responsibility for individual development, he cites cooperative efforts (through a project of the NUCEA) to contribute to professional growth by offering specialized educational programs.

Though the custom has been to hire individuals whose professional preparation is outside the field of adult and continuing education, some believe that such hiring decisions fail to recognize the value of shared experiences in graduate school. In this context, Long (1983) described staff development as a remedial procedure for individuals working in adult education after preparation elsewhere, which is of growing importance to professionally prepared adult educators.

The *NUCEA Standards of the Division of Independent Study* specify "in-service training opportunities for professional development should be available to the staff" (1990, Sect. IV.D). For

many years, the document has recommended evaluating the adequacy of existing opportunities and has stated that the benefits and working conditions of the nonteaching staff should be comparable with those of other professional positions in the institution.

Simerly (1981) concluded that the organizational context greatly influences choices made in staff development. Analysis of the "performance dynamics" of continuing education organizations has led to the conclusion that differing organizational models—entrepreneurial, academic, or integrated—shape staff development needs (King & Lerner, 1987). Organizations following an entrepreneurial model, in which success is measured in income generation, have inherently different dynamics than those following an academic model, in which the priorities are research, teaching, and public service. The integrated model, which may be increasingly common, combines a concern for profitability with academic rigor. Clearly, the skills required of the professional staff would differ in each case: the entrepreneurial group would value sales, the academic group would stress service, and the integrated group would reward skillful project management. Thus, appropriate staff development programs at present differ greatly with organizational context, and in the absence of agreement on a common body of professional knowledge, the work environment will continue to be the controlling consideration in professional development programs.

Summary and Conclusions

As the education and training of independent study staff members has grown, professional status has grown accordingly. Today, independent study is increasingly a focus of professional activity.

Staff members continue to be drawn from a variety of disciplines and backgrounds. Thus, the abundant opportunities for education and training meet a defined need. Though required skills and competencies vary greatly among independent study

positions, both the professional environment and the organizational environment are strongly supportive of formal programs of professional development.

The patterns followed in today's professional development are based on meeting individual needs rather than assuring appropriate preparation in an agreed-upon body of knowledge and skills. The education and training of independent study professionals will continue to be shaped by the need for practitioners to acquire new skills, by the evolving technologies of education, and by the organizational contexts of their efforts.

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Chapter 9

Editors in Distance Education Programs: Their Characteristics and Roles

Nancy Gaines and Elizabeth Houdek

The rational development of a course is a professional craft, i.e., it involves a combination of art and science at an intellectual level. (Elton, 1989, p. 231)

In this centennial of university-based distance education in the United States, it is appropriate to reflect on the state of the "professional craft," especially the ways in which course developers/designers/editors interact with course writers to produce materials that are not only appropriate but inviting for students working at a distance from our institutions.

We originally intended to use two previous landmark studies of distance education in the United States *Correspondence Instruction in the United States* (MacKenzie, Christensen & Rigby, 1968) and *The Changing World of Correspondence Study* (MacKenzie and Christensen, 1971) as points of reference for our study. However, as Markowitz (1988) noted, "In a detailed analysis of correspondence institution staffing at that time, the editor's role was not discussed." Additionally, a search of published information over the past 20 years did not reveal any research relating to edi-

tors in distance education as a group. Therefore, rather than a historical comparison of the characteristics and roles of editors then and now, we have tried to provide a systematic overview of those who currently practice the professional craft of editing and course development in our institutional distance education programs.

Our study focuses on several areas: the demographic characteristics of course developers/designers/editors, the nature of their collaboration with course authors, the influences on the standards for course design and production, and the impact of desktop publishing and other technologies on the work of writers and editors.

The information was gathered from two surveys: one sent to the director of each program listed in the 1988–1989 Membership Directory for the Independent Study Division of NUCEA, and the second sent to any person listed in the Directory with the title of “editor,” “course developer,” “course designer,” or “instructional editor/developer/designer. In an attempt to reach people in the latter categories not listed in the Directory, two editors’ survey forms were sent to the program director to be passed on to the person in the program with design, development, or editorial responsibilities.

The Surveys

The texts of the directors’ and editors’ surveys are reprinted at the end of this chapter. Directors’ surveys were returned from 54 programs. Eighty-five editors’ surveys were returned, representing 86 positions in 40 programs. Both large and small programs were represented in the returns from both surveys, including seven programs with enrollments of less than 1,000 students in 1988–89, and 16 of the largest 20 programs (Research and Evaluation Committee, 1990).

Both editor and director survey responses were received from 42 programs, director responses only from 14 programs, and edi-

tor-only responses from 2 programs. Fifty-six of the total of 58 programs responding were listed in the 1988–89 *Independent Study Program Profiles* (Research and Evaluation Committee, 1990), representing 73% of the programs listed. Director responses were received from two programs not listed in *Profiles* (in both instances, faculty writers are responsible for editing). The 12 director-only responses from programs in *Profiles* represent only 5.5% of the total editorial positions listed there.

Profiles first gathered data on the number of editors/course developers for the 1987–88 report (Research and Evaluation Committee, 1989). Significantly, the 90.6 positions listed in the 1988–89 *Profiles* represented an increase of nearly 16 positions, or 17%, over 1987–88. Programs represented in the 86¹ responses to the editors' survey reported 72.95, or 80%, of the positions listed in the 1988–89 *Profiles*. Of the 48 programs listing editor/course developer positions in *Profiles*, editor responses were received from 31. Nine editor responses were received from among the 29 programs reporting *no* editor/course developer positions.

The number of fractional editor/course developer positions listed in *Profiles*, together with the number of editors working part-time who responded to both the directors' and editors' surveys, makes it impossible to estimate the percent of working editors our data represents; still, comparison of *Profiles* data with that from both sets of responses indicates that we have a representative sample for our purposes.

The increase in reported editor/course developer positions coupled with our editor response from programs listing *no* such position in the 1988–89 *Profiles* is a clear indication that the importance of the editor/course developer function is gaining recognition, regardless of the title of the person performing it.

¹One survey form contained responses from two editors.

The Distance Education Course Editor Today

Characteristics of editors in distance education programs such as gender, age, race, educational level, subject area, and previous professional or work experience are clearly relevant to examination of the author-editor relationship, as are the similarities and/or differences between editors and the authors with whom they most frequently work, the members of their institutional faculty. It is also instructive to see how they compare on these basic demographics with what is probably their closest peer group in publishing, university press editors. (Twenty-three of the 58 programs represented in total responses share their campus with a university press [Association of American University Presses, 1989].) Available data permit comparison of editors with faculty with regard to gender, age, and race, and with university press editors in these characteristics plus educational level, field of study, and previous job/professional experience as well.

Gender. In responses to our editor survey, women outnumber men by about 60% to 40% (N = 83). Among university press editors, women outnumber men by a somewhat greater margin—72% to just over 27% (Nichols, 1985). The reverse is true of college/university faculty members: there the ratio is about 68% male to 32% female (“Characteristics of college . . . faculty,” 1989).

Age. Distance education editors for the most part (77%, N = 81) are 30 years of age or older, with the largest number (41%) falling in the 40- to 45-year age range. Those between 20 and 30 years old numbered 23%, and those over 55 accounted for 9%. The average age reported for university press editors was 41.5 years (median age: 39 years), with a range from 21 to 69 (Nichols, 1985). College/university faculty show a similar distribution, with nearly 67% in the 40 to 60 age range. Under 40 are 17.5% and over 60 are 16% (“Characteristics,” 1989).

Race/Ethnicity. Racially and ethnically, 95.4% of editor respondents (N = 83) identified themselves as white, just under 4% as black, and just over 2% as “other,” with no specification. University press

editors are comparable as to percentage who are white (94%), but diverge on other designations: Asian, 2.3%, Native American, 1%, black and other, each less than 1%. (Nichols, 1985. Information on university press editor breakdown by race/ethnicity, though dating from 1985, was confirmed as valid for 1989 in a personal communication in early 1990 from AAUP national offices in New York City.) Racial/ethnic characteristics of college/university faculty are as follows: 92.5% white, 2.4% Asian, 2.2% black, 1.7% hispanic, 0.5% American Indian, and 0.6% other ("Characteristics," 1989).

Education. As expected, the level of education of editor respondents is high. The degree level reported by the largest number was the master's degree (38%, N = 84), followed by the bachelor's degree (27%). Equal numbers (14%) reported having a doctorate or having some college but no degree. Associate degrees were reported by 2%. Slightly more than 3% did not respond to this question. Similar educational levels were reported by university press editors: master's, 41%; bachelor's, 37.8%; doctorate, 12.9%. A category of ABD ("all but dissertation") was included in the university press survey data and reported by 7.4% of the respondents (Nichols, 1985); however, our study included these in the master's degree category.

Seventy-five editors' survey respondents listed the subject area in which they received their degree(s). Twenty-two (29%) listed degrees in two or more fields; over 18% of the total combined a degree in education or teacher certification with a degree in one or more other fields. (Many listed extensive study in fields other than those in which they received degrees but which they apparently felt were relevant to their present work.) In common with their counterparts across the publishing industry (Nichols, 1985), editors most frequently (35) listed English as their major field. Next were education (21), history (11), journalism (10), business (6), foreign language (4), and communications and science (3 each). Mentioned by two respondents were political science, comparative literature, psychology, philosophy, advertising, music, and engineering. Other fields with one mention each were mathematics, educational psychology, library science, sociology/social work, and

art history. Similarly, over 95% of university press editors "reported having liberal arts or social science backgrounds [with] English . . . the most common major" (Nichols, 1985, p. 259).

Experience. Editors are an eclectic group with regard to previous work/professional experience as well as educational background. Here, too, the respondents' perceptions of what is relevant to their present work are reflected in their answers. The editors' survey asked for experience of two kinds: previous editing/course design/course development (ed/cd/cd) experience and other previous professional or work experience. Teaching figured prominently in both categories: it was listed as "previous experience" by the majority of respondents (over 46%; $N = 73$) and "previous ed/cd/cd experience" by nearly 16% of respondents ($N = 63$). Journalism and writing/course writing were also listed in both categories. Previous ed/cd/cd experience reported, in order of frequency, encompasses editorial, including journalism (46%), teaching (16%), writing (11%), course writing (6%), wordprocessing/desktop publishing (6%), other occupations (such as coaching, nursing, social work, 3%), course design (3%), and media other than print, continuing education, and graphics (each 1.5%). Listed in order of frequency as previous experience other than ed/cd/cd (some respondents had previous experience in two or more areas) were teaching (46%), other occupations (16%), miscellaneous (janitor, fast food store clerk—50% of respondents listing these jobs were under age 30—14%), secretarial/clerical (11%), business and continuing education (each 9.5%), writing (8%), journalism (5%), computers and graphics (each 4%), librarian (3%), and media other than print (1%). Similarly, among university press editors "the most frequently mentioned [job title] was that of teacher . . . just under 30%" (Nichols, 1985, p. 259); fields related to editing and journalism were next (precise figures were not given).

Where Are Editors and What Do They Do?

Because of the great potential of the author/editor relationship in terms of designing materials to enhance learning at a distance, it is important to know just how much time editors actually have available for these functions. Thus we have gathered data on number of editors relative to program size, on percent of time editors are employed, and on their range of duties and responsibilities.

For the most part, there is a clear relationship between size of program and number of editors as reported by 54 directors' survey respondents. The larger the enrollment and the more courses offered, the larger the number of editors. The four responses from directors reporting 10 or more editors (including course design/development personnel), including both full and part time, were from programs with an average enrollment of 14,600 (range: 4,000–19,000) and an average of 336 courses (range: 132–393). Programs with 6–9 editorial personnel averaged 10,400 enrollments (range: 5,800–14,200) and 268 courses (range: 75–488). For four editors, the numbers were 6,200, average enrollment and 241, average courses. Programs with three editors averaged 3,100 enrollments and 108 courses.

The relationship between number of enrollments/number of courses and number of editors is not entirely consistent, however. Among the programs with the fewest editorial positions, the 22 programs reporting two editors had an enrollment range of 452 to 13,120 (average 4,198) and course range of 24 to 269 (average 137). Eleven programs reporting one editor (working at least half-time) had an average enrollment of 2,635 (range: 75–6,351) and an average of 110 courses (range: 15–215).

Responses to the editors' survey indicated that the number of courses in the curriculum was not the only measure of potential workload, however. Comparison of responses to question #3, number of print jobs processed annually, indicates that editorial offices frequently process more jobs than would be expected to

maintain their curriculum. Most likely, they produce marketing and promotional pieces, and perhaps edit and produce other publications for their institutions. Of the 62 useable responses to question #3, 60% indicated 200 or fewer print jobs processed per year and about 40% indicated 300–600. Preliminary review seems to indicate that the programs with the greatest number of editorial positions tend to have a print-job workload that indicates program maintenance (including processing of reprints, major and minor revision of existing study guides to accommodate new editions of course textbooks as well as for other purposes, and new course development) as the primary role of editorial personnel. This would be an interesting area for future investigation: How much time can an editor devote to a given course-development or course-revision project? Implications of the answer are important, as we know empirically that course quality is strongly related to the amount of editorial/course development time invested in the course study guide.

Part-Time or Full-Time. None of the 16 programs with the largest number of editors report full-time editors exclusively—12 use a combination of full- and part-time staff, and 4 use part-time staff exclusively. The majority of editor respondents are full-time employees (81%, $N = 83$). Analyzed by gender, females outnumber males as both full-time and part-time employees, although a larger percentage of male editors than of female editors work full-time (full-time employees: 30% males, 39% females; part-time employees: 12% males, 24% females).

Salary. Salary range responses offered some interesting comparisons. (Salary ranges are based on full-time equivalents.) About 66% ($N = 83$) of respondents reported earning over \$20,000 annually, and 34% under that amount. The largest numbers were found in the under-\$15,000 range (20%) and the \$20,000–\$25,000 range (29%). Next in order of frequency were the \$25,000–\$30,000 range and the over-\$35,000 range (both with 14%) and the \$15,000–\$20,000 range (13%). The least number of respondents (8%) reported salaries in the range of \$30,000 to \$35,000.

An overall comparison of salaries by gender found 92% of females and just over 54% of males reporting salaries under \$30,000. Salaries of \$30,000 and above were reported by 45% of males and 8% of females. (Nichols [1985] made a similar finding: "Although about 72% of the respondents were women [university press editors], a disproportionately high number of them fall into the two lowest salary ranges.") However, some further light may be shed on the matter of salaries in the discussion of duties and responsibilities that follows.

Duties. As do editors in other types of publishing, those in our independent study programs combine editing with a variety of other responsibilities. Here, too, some significant differences appear in both gender and salary. We used a traditional definition of the editorial function in analyzing editor responses related to duties and responsibilities. Roughly this included advising authors on appropriate style and design, evaluating preliminary manuscript samples, editing prepared manuscripts (on computer or not), conferring with authors, establishing formats, handling production and incorporation of graphics and the like, overseeing production and working with printers, proofreading and/or supervision or coordination of proofreading. For purposes of analysis, ten additional categories of duties were established from the job descriptions given by respondents:

1. preliminary course design/development
2. typesetting/production (performing, not supervising, this function)
3. director/administration
4. writing (generating materials)
5. marketing/promotion (newsletters, catalogs, etc.)
6. teaching/instruction
7. student services (counseling, lesson flow, registration)
8. clerical (files, office management, secretarial)

9. media development

10. curriculum development

Although our information must be regarded as somewhat imprecise—some respondents described their duties and responsibilities in much greater detail than others did—nevertheless, the findings that follow are reinforced by responses to Question #6, discussed later in this chapter.

Fewer than 20% of editor respondents reported performing traditional editorial duties only. Most combine editing with one or more of the ten functions listed above. Surprisingly, over 10% reported performing *all* program functions. Preliminary design and development were reported as their sole functions by 7%, and typesetting/production by 1%. Functions cited other than editing, in order of frequency, were director/ administrator, 30%; marketing/promotion, 23%; preliminary design/ development, 22%; typesetting, 17%; clerical, 6%; curriculum and student services, both about 4%; writing, 2%; and media development, 1%. See Table 1, pp. 201–204, for data on gender, salary, educational level, and field of study associated with these categories.

In duties performed both alone and in combination with editing (see above), females predominate in all categories except writing (generate materials) and director/administrator, where the gender breakdown is about fifty-fifty. The highest salary ranges predominate for director/supervisor/administrator; the salary breakdown by gender in this category reveals that 90% of male salaries are \$30,000 or above compared with 33% of female salaries. Typesetting/production (71% female versus 28% male) falls into the lowest salary range. For those who do editing only, the female/male ratio is 62% to 37%; all salaries are below \$30,000 and 69% are below \$20,000. Eighty percent of females and 50% of males fall in this lower range; 20% of females and 50% of males are in the higher range. Those involved in preliminary course development and design are 72% female and 28% male; the distribution of salary by gender in this category is fairly even, though the range is great: from under \$15,000 to over \$35,000. In this, as in other categories, salary was clearly influenced by the

**Table 1. Relationship of Function to Other Factors for Editor Respondents
(in order of frequency; N = 83*)**

Part I: For Three Special Categories

Function	Gender		Salary ¹		Degree ²		Field(s) of Study ³	
	%		Range	%F; %M	Type	%	%F; %M	Field
1. Editing only (19%)	F: 62	M: 37	1/ 25	75; 25	SC: 25	75; 25	English/Journalism ⁴ 37 Education 6 Business 6 History 6 Media 6 Music 6 Social Work 6 NG ⁵ 25	
	2/ 44		71; 29	A: 0	0; 0			
	3/ 19		0; 100	B: 25	100; 0			
	4/ 12		100; 0	M: 44	43; 57			
				D: 6	0; 100			
2. All program functions (11%)	F: 55	M: 33 NG: 11	1/ 11	100; 0	SC: 22	100; 0	English/Journalism 22 Education 22 Engineering 11 Nursing 11 Nutrition 11 NG 22	
	2/ 11		100; 0	B: 11	100; 0			
	3/ 22		50; 50	M: 33	67; 33			
	4/ 22		100; 0	D: 33	0; 67 ⁶			
	5/ 11		0; 100					
	6/ 33		0; 67 ⁶					
3. Course design/development only (7%)	F: 83	M: 17	3/ 83	80; 20	B: 67	75; 25	English/Journalism 50 Education 17 Modern Language 17 Sociology 17	
	4/ 17		100; 0	M: 33	100; 0			

*Of the 85 questionnaires returned (representing 86 editorial positions), 83 provided information usable in the tabulations.

The following footnotes apply to the table on pp. 201-204.

¹Ranges: 1/ under \$15,000; 2/ \$15,000-20,000; 3/ \$20,000-25,000; 4/ \$25,000-30,000; 5/ \$30,000-35,000; 6/ over \$35,000.

²Indicates highest level attained: SC = some college but no degree; A = associate degree; B = bachelor's degree; M = master's degree; D = doctorate.

³May not add up to 100 percent; 29% of respondents have degrees in more than one field.

⁴Includes literature and other related fields.

⁵NG = not given.

⁶Do not add up to 100 percent; some information not given.

Table 1. Relationship of Function to Other Factors (cont'd)
(in order of frequency; N = 83)

Part II: For All Responses

Function	Gender		Salary ¹			Degree ²			Field(s) of Study ³	
		%	Range	%	%F; %M	Type	%	%F; %M	Field	%
1. Director/ administrator (30%)	F:	48	1/	8	100; 0	SC:	8	100; 0	English/Journalism ⁴	36
	M:	44	2/	8	100; 0	A:	4	100; 0	Education	36
	NG:	8	3/	8	100; 0	B:	12	67; 33	Business	8
			4/	16	50; 25 ⁶	M:	44	45; 45 ⁶	Engineering	8
			5/	20	40; 60	D:	24	17; 67 ⁶	History	8
			6/	40	20; 70 ⁶	NG:	8		Music	4
									Nursing	4
2. Promotion/ marketing (23%)	F:	63	1/	15	100; 0	B:	37	71; 29	English/Journalism	32
	M:	36	3/	40	57; 43	M:	37	71; 29	Education	32
	NG:	10	4/	15	100; 0	D:	16	33; 33 ⁶	Business	5
			5/	15	67; 33	NG:	10	50; 0 ⁶	History	5
			6/	15	0; 33 ⁶				Nutrition	5
									Nursing	5
									NG	16

Note: Function percentages in Part II show percent of respondents who cited the function as part of their job. Since many respondents reported a combination of responsibilities, these percents do not add to 100.

Table 1. Relationship of Function to Other Factors (cont'd)
(in order of frequency; N = 83)

Part II: For All Responses (cont'd)

Function	Gender		Salary ¹			Degree ²			Field(s) of Study ³	
		%	Range	%	%F; %M	Type	%	%F; %M	Field	%
3. Preliminary course development/design (22%)	F:	72	1/	5	100; 0	SC:	5	100; 0	English/Journalism	61
	M:	28	3/	61	73; 27	B:	33	67; 33	History	28
			4/	11	100; 0	M:	39	71; 29	Psychology	11
			5/	5	0; 100	D:	17	67; 33	Business	5
			6/	17	67; 33	NG:	5		Communication	5
								Education	5	
								Library Science	5	
								Modern Language	5	
								NG	11	
4. Typesetting/production (17%)	F:	71	1/	50	71; 29	SC:	50	71; 28	English/Journalism	43
	M:	28	2/	28	75; 25	B:	36	80; 20	Business	21
			3/	14	50; 50	M:	14	50; 50	Media	7
			4/	7	100; 0				Political Science	7
								Science	7	
								NG	14	
5. Office management/files/clerical (6%)	F:	60	1/	20	100; 0	A:	40	100; 0	English/Journalism	60
	M:	40	2/	60	67; 33	B:	20	100; 0	Business	20
			6/	20	0; 100	M:	40	50; 50	NG	20
6. Student services/counseling/lessons/registration (4%)	F:	33	2/	33	33; 0 ⁶	M:	33	100; 0	English/Journalism	33
	M:	0	6/	67	0; 0 ⁶	D:	33	0; 0 ⁶	Business	33
	NG:	67				NG:	33	0; 0 ⁶	NG	33

Part II: For All Responses (cont'd)

Function	Gender		Salary ¹			Degree ²			Field(s) of Study ³		
	%		Range	%	%F; %M	Type	%	%F; %M	Field	%	
7. Curriculum development (4%)	F: 67 M: 33		1/ 6/	33 67	100; 50;	0 50	M: 67 D: 33	100; 0;	0 100	English/Journalism Nursing NG	33 33 33
8. Writing (generating instructional materials) (2%)	F: 50 M: 50		3/	100	50;	50	M: 50 D: 50	100; 0;	0 100	Education History	50 50
9. Media development (1%)	F: 100 M: 0		4/	100	100;	0	M: 100	100;	0	Education	100
10. Teach/instruct (Two of 85 responses indicated that all course development and editorial functions rested with program/institutional faculty.)	NA		NA				NA			NA	

particular combination of responsibilities (analyses of salary by factors such as size of program and time in position were not attempted). (See Table 1 for detailed breakdown of salaries and gender.)

Training. Of respondents who gave sufficient information to classify in response to Question #5, "Please describe training . . . at the start of your present job," the largest number (over 20%, N = 43) listed a combination of design-specific and desktop publishing/wordprocessing training. An equal number listed such unstructured experiences as sharing an office with an experienced editor, working with other editors, second reading of manuscripts by colleagues, or periodic review of work in process by a supervisor. Next were those who received design-specific training only (nearly 19%), although some degree of design-specific orientation was implicit in the responses of an additional 52%. Those who reported training only in desktop publishing/wordprocessing or only in office routine and procedures both numbered 12%.

As to training materials used, 10% (all from larger programs) reported that an in-house manual figured in their training. Review of existing study guides was frequently mentioned as part of both design-specific and less structured training. No mention was made of reviewing samples of award-winning courses, although these have been disseminated as part of the awards process for several years (see the discussion under "How Are Standards Determined" for more information about how these samples may be used).

Respondents who answered in the ways just described represented about 58% of total editors' survey responses (N = 83); of these, nearly 28% specified that they had received no training of any kind or had "learned by doing." Some of these responses were from programs where other responses, from editors with similar duties and time on the job, indicate strong emphasis on training. Directors' survey responses show that larger programs generally provide the most training resources for new employees, although some respondents evidently question their effectiveness.

Described by respondents as previous training relevant to present work ($N = 44$) were previous editorial work (including journalism), 50%; classroom instruction (in editing, journalism, and writing, including English, usually as part of a degree program), 27%; workshops (including NUCEA-sponsored) and teaching (especially English), each nearly 7%. Other training (about 9%) included preparation of the respondent's own thesis or dissertation, work in the printing business, and "self-taught."

Time on Job. There are many new employees in our sample: about 66% ($N = 79$) have been on the job five years or less, with the largest portion (over 22%) falling in the 1-3 year range. Next in frequency were 3-5 years (about 23%), 5-10 years (over 16%), 10-20 (15%), less than one year (14%), and over 20 years (2%). The relative inexperience of the majority of our respondents is possible evidence both of new respect for the editorial/course design function (if increase in positions in *Profiles* between 1987-88 and 1988-89 is any indication of this) and of the staffing adaptation to desktop publishing evident in some programs. In the former case, in two larger programs new workers at the associate/assistant editor level have responsibility for backlist maintenance as their principal function, freeing higher-level staff to concentrate on new course development. In the latter, course development and design functions are performed by experienced, full-time instructional designers and administrators, whereas type formatting, design, and copyediting functions have been combined with typesetting and relegated to inexperienced, mostly part-time employees.

The age of a program had no particular relevance to respondents' time in job. The two program-age categories from which most responses came, 10-19 years (22%) and over 40 years (72%), showed about equal numbers of employees with both more and less than five years on the job.

The Collaboration of Course Editors and Writers

From my experience, the relationship between the subject specialist and instructional designer [editor] needs to be that of colleagues and I prefer the description of joint venturers. . . . the notion that both are working together and that the ultimate beneficiary of their endeavours will always be the learner. (Jackling, 1989, p. 40)

The foregoing comment from one instructional designer in distance education suggests that the relationship between course writers and course editors is collaborative. The results of our survey support this idea of partnership in course development. Question #6 on the editors' survey classified the involvement of course editors with various tasks related to course development. Throughout the following discussion, except as noted, we have chosen to use the term "editor" to designate any person with the responsibilities described by the survey questions. This is the title designated most frequently by our respondents; over 60% had the word "editor," "publication," or "production" in their title. About 23% had "design," "developer," "instruction," "curriculum," or "course," sometimes in combination with "editor." Twenty-two percent had "director," "manager," "head," "coordinator," or "administrator," alone or in combination with either of the above.

The term "course guide" is used in a general sense to mean the printed instructional materials prepared for the students in a distance education program. The term "study guide" appears in much of the literature and in materials from the Division of Independent Study, National University Continuing Education Association.

Because there was no previous study with which to compare our data, the discussion here will be largely descriptive; we have tried to present a "photograph" of distance education editors at this time. We have not attempted to analyze every possible correlation or to discuss every possible interpretation of the data.

The first part of Question #6 asked at what point the course editor entered the course development process and the most common entry point. Because more than one response was possible on this part, the total number of responses was 228 for a. 1-5 and 74 for the follow-up question. Twenty-one percent responded that the editor entered the process when the course was being designed; 59% were involved by the point when the material was being written; and by the time the study guide writing was complete, 89% of the editors were involved. The two most common entry points were when the course was being designed (32%) and after the study guide was written (41%). Eight respondents (representing less than five institutions) noted that course designers/developers and course editors are different people; therefore, the responses may reflect differences in the separate roles.

Part b. of Question #6 provides an overview of how various tasks in course development are allocated between course writers and editors. Responses are summarized in Table 2.

Writers are involved at every step, either solely or in partnership with the editor. Writers have most control over choosing textbooks (85% have exclusive control), deciding on examination content (87%), and deciding on reading, writing, and listening assignments (88%). Other areas in which a majority of writers have sole control are deciding on content to be taught by each medium (73%), deciding on objectives for each study unit (72%), deciding on self-help/self-study assignments (73%), and designing written assignments and evaluation (76%).

With the exception of one anomalous case where the program director was responsible for all facets of the course production process, few course editors had exclusive control over any aspect of the process; only 76% had exclusive control over the editing of study guides, 49% over permissions and clearances, and 35% over proofreading. Graphics and cover art and standardized information on course mechanics were two other areas where some editors had exclusive control.

Table 2. Course Development Responsibilities by Function

<i>Function</i>	<i>Responsibility by Percent¹</i>			
	<i>Writer</i>	<i>Editor</i>	<i>Shared</i>	<i>Other</i>
Identify course objectives	64.0	1.0	35.0	
Plan course structure	58.0	1.0	41.0	
Choose textbooks	85.0	-0-	15.0	
Choose content for each medium	73.0	1.0	26.0	
Organize content into study guide	60.0	1.0	39.0	
Decide on exam content	87.0	2.0	10.0	
Formulate study unit objectives	72.0	-0-	27.0	
Decide assignments	88.0	1.0	10.0	
Decide study notes/commentary	68.0	1.0	30.0	
Develop self-help, self-test mats.	73.0	-0-	27.0	
Design written assignments/eval.	76.0	1.0	20.0	1.0
Cover art, internal graphics	12.0	25.0	62.0	1.0
Obtain permissions, clearances	15.0	49.0	35.0	1.0
Intro. matl. on course mechanics	26.0	30.0	42.0	1.0
Intro. to course and ind. study	39.0	5.0	55.0	1.0
Edit manuscript	-0-	76.0	21.0	2.0
Proofread study guide	1.0	35.0	59.0	2.0

¹Totals may be less than 100 percent because of nonresponses.

The collaboration or sharing between writers and editors is further confirmed by responses to part b. All tasks listed on the survey showed some degree of sharing, ranging from 10% on assignment decisions to 62% on graphics and art decisions. Occasionally, course development tasks are shared by someone other than writers or editors, for example, illustrators, graphics designers, or proofreaders (see Table 2).

Parts c. and d. of Question #6 measured the degree of "veto power" or control over course development exercised by writers and editors, respectively. Over 83% of directors (N = 54) answered yes without qualification in answer to the question "Can your program reject a manuscript or require a course writer to make substantive changes?" Significant numbers of editor responses were "yes" to both questions (65% in part c. and 59% in part d.); however, there were many nonresponses or "other" responses. These comments generally stressed that writers and editors preferred compromise and accommodation on points of conflict.

The remaining sections of Question #6 dealt with editor roles in team-based course development and development of multimedia courses. Responses to the editors' survey suggest that the course-team development model, widely used in distance education programs outside the United States, is not the prevailing model in our university-based programs. Only 43% of respondents (N = 85) stated that they had been part of a course-development team. Of the affirmative responses, 62% stated their status was equal team member; 19% had been team leaders; and 19% had been subordinate team members. Comments on these parts of the question indicated that the team approach was not a common one, that the editor's status may vary with the nature of the project, and that third-party agencies or funding sources may influence or control team-developed courses more than does the institution or academic department.

Part g. of Question #6 concerned production of multimedia courses, that is, courses using more than one medium of presentation. The number of responses was small, only 47, and not all

respondents completed all sections of part g. However, 84% of respondents had been involved in multimedia production.

Print and nonprint elements were developed simultaneously in 47% of cases, print elements were developed first in 33%, and nonprint elements first in 20% of cases. Although we cannot generalize from such a small sample, our responses still support the "primacy of print" in multimedia courses, with 58% of respondents stating that print components were seen as primary and 29% stating that print and nonprint components were equal.

The survey responses also suggest that the editor has a significant role in multimedia course development: 65% of editors have input into development of nonprint media, although one comment suggested that the study guide editor is not in a position to evaluate the use of nonprint media. Editors also have control of the print elements of a multimedia course, with 72% stating that nonprint media specialists do not have input into print materials. Comments on this section suggest that audio or video producers are the ones most likely to have input if any is given.

The responses suggest some directions for further exploration and research. However, it does seem clear that course editors in our programs have a closely collaborative relationship with course writers and that their skills and experience represent a professional resource for those programs and writers.

How Are Standards Determined?

Question #7 of the survey provides information about the standards or guidelines that course editors use to achieve and maintain a high level of quality in their programs' instructional materials. The first two sections gathered information about the standards for editorial style and consistency. The third section identifies some factors considered in course production and measures the relative weights of those factors.

Over 98% (N = 85) of editor respondents reported using some type of guide to editorial style. While some rely entirely on internal style sheets, many have a variety of references available. Most use a standard publisher's reference manual such as *Chicago Manual of Style* (1982), *Words into Type* (1974), the *Gregg Reference Manual* (Sabin, 1985), the *MLA Style Guide* (Achttert and Gibaldi, 1985), and the *Associated Press Stylebook* (French, 1989) (the latter two representing opposite ends of the publishing spectrum from scholarly standards to journalistic ones). See Table 3 for a listing of style manuals by frequency of use. Internal office style sheets were used by over 75% and institutional style guides by over 20%. (Use of the latter may increase as a result of the print materials standard introduced in 1989 into the *Standards of the Division of Independent Study of the National University Continuing Education Association*, which cites "institutional standards" as the value governing print materials.)

Over half of the respondents report using Division of Independent Study course awards criteria as a resource; this could indicate both the desire to achieve these standards in all courses

**Table 3. Style Manuals Most Frequently Used
(in percents; some respondents use several)**

<i>Chicago Manual</i> (1982)	75%
<i>Words into Type</i> (1974)	16%
<i>Gregg</i> (Sabin, 1985)	14%
<i>Associated Press</i> (French, 1987)	9%
<i>MLA</i> (Achttert & Gibaldi, 1985)	9%
Others ¹	under 3%

¹American Psychological Association (1984); Copperud (1980); Fowler (1989); the *Scott, Foresman Handbook* (Hairston & Ruszkiewicz, 1988); Strunk and White (1979). Note: No respondents listed the *Chicago Guide to Preparing Electronic Manuscripts* (1987).

and intention to submit courses for judging. Recourse to instructional design resources, on the other hand, is surprisingly low (less than 13%). Respondents indicating access to these resources usually use a number of other guides as well, both standard reference manuals and style sheets. For our sample, the most likely explanation is that design falls largely within the course writer's province (see discussion of 7c. below). Among design resources listed by respondents were books and journal articles, workshops and seminars (including those sponsored by the Division of Independent Study), internal author manuals, and campus learning centers.

Part c. of Question #7 on the editors' survey listed eight possible factors that could influence the production quality of instructional materials, including cost, program policy/image, institutional policy/image, competition with commercially produced textbooks and materials, learner needs, instructional design techniques, availability of technical resources, and NUCEA course award guidelines. Table 4 summarizes the responses to this question; of the 85 surveys returned, two did not respond to this part at all and one did not respond to #6 and #8 of this part.

Number 5, "learner's needs," was clearly the most important factor in course production; 65% of respondents ranked it most important, and the combined response for ranking of 4 and 5 was 84%. Number 4, "competition with . . . commercially produced materials," was rated as least important, with 38% ranking it at 1 and only 7% ranking it either 4 or 5.

The combined rankings of 4 and 5 for each factor are given in Table 5.

On this basis, other important factors are program policy/image, instructional design techniques, and availability of production resources. Two observations concerning the responses seem particularly interesting. The first is that less than half of the respondents ranked cost as either 4 or 5, although only 6% ranked it as least important. In spite of the sometimes "peripheral" sta-

Table 4. Considerations Governing Appearance of Instructional Materials

<i>Category</i>	<i>Rank by Percent¹</i>				
	(1) <i>Least important</i>	(2)	(3)	(4)	(5) <i>Most important</i>
Cost	7.0	10.5	34.0	27.0	19.0
Program image	2.0	7.0	24.0	35.0	29.0
Institution image	6.0	12.0	28.0	33.0	19.0
Compete with commercial matls	38.0	30.5	22.0	3.5	3.5
Learner needs	2.0	2.0	8.0	19.0	65.0
Instructional design	2.0	9.0	25.0	28.0	32.0
Available tech. resources	14.0	5.0	15.0	41.0	22.0
NUCEA course awards	23.5	13.0	33.0	14.0	13.0

¹Percents do not total 100 because of nonresponses.

tus of distance education programs in our institutions, it seems that there is a commitment to use program funds for course production.

The second observation that intrigued us is the "divided" nature of the response to #8, "NUCEA course awards." About equal numbers of respondents ranked this factor as 1, least important (23.5%), and as 4 and 5, important or most important (27%). An informal evaluation of this item with size of program did not show any correlation, either positive or negative, between ranking on this factor and program size. Since one of the primary purposes of the course awards is to encourage our member programs to emulate the qualities of the award-winning courses, the responses to this item might suggest some further investigation to evaluate our findings.

Table 5. Importance of Factors Influencing Quality of Materials

<i>Factor</i>	<i>% of Rank 4</i>	<i>% of Rank 5</i>	<i>% of 4 and 5</i>
1. Cost	27.0	19.0	46.0
2. Program policy/image	35.0	29.0	64.0
3. Institutional policy/image	33.0	19.0	52.0
4. Competition with commercial materials	3.5	3.5	7.0
5. Learner's needs	19.0	65.0	84.0
6. Instructional design	28.0	32.0	60.0
7. Production resources	41.0	22.0	63.0
8. NUCEA course awards	14.0	13.0	27.0

The Impact of Desktop Publishing

Both editors and directors were surveyed concerning the extent to which the computer revolution in editing and publishing has affected the course development and production process in university-based distance education programs.

Question #8 on the editors' survey, which asked specifically about "desktop publishing," was answered by all respondents. However, it was clear from a number of responses that the question needed further definition of the term. There seemed to be

some question whether the term meant any computer-aided editing or course design or meant only full-featured graphics and page layout capabilities.

Of our respondents, 67% said desktop publishing (DTP) was used in production of their courses; 29% answered no, and the remainder were "other" responses. Most comments about the use of DTP were positive: several respondents noted the flexibility of design possible with DTP, along with decreased dependence on outside resources for such things as graphics and page design. Almost all comments praised the increased production quality of materials produced with DTP. Very few respondents cited improved speed or efficiency as a major advantage, and more than one respondent stated that DTP can have unforeseen consequences for staff functions and work flow.

Directors were asked whether their programs now use desktop publishing; if not, whether they expect to be using it within two years; and if so, how long they have used it and what its impact has been. Over 54% reported using desktop publishing at the present time, although, as noted above, the actual definition of the term is not precise. Of the remainder, over 41% expected to be using it within two years. Most users (over 59%) have had two to five years' experience with their systems, and over 11% have had more than five years' experience. Twenty-nine percent reported less than two years' experience.

Directors were surveyed in some detail about the impact of desktop publishing on their operations. All cited change in standards for study guides, and nearly 70% cited introduction of graphic and other elements such as maps, charts, and improved cover design. Over half cited changes in their work processes, including author manuscripts submitted on disks, on-screen editing and formatting, elimination of proofreaders or change in proofreading procedures, and allocation of more production time to graphics. Realignment of staff duties and responsibilities was cited by 31%; among those specified were increased responsibility for both typesetters and editors, with each taking on some of the other's traditional functions.

A variety of occasionally contradictory observations were made by the 27% of directors who responded to a request for general comments on the impact of desktop publishing: that desktop publishing is more efficient and more flexible than older systems; that it promotes better writing; that it takes less time; that it takes two to three times longer; that it has raised standards in all aspects of course development; that no large or fundamental changes have resulted. We see the area of desktop publishing in independent study as an interesting and important one for continued observation and inquiry.

What's in the Future?

[I]t is appropriate to ask constantly, "What is the role of the educational developer"? There is general agreement that it is to assist with teaching strategies, to improve communication skills, to extend the use of group dynamics, to assist with appropriate assessment, to provide a role as surrogate student, to ensure that technologies are appropriately used and to develop policies and practices through research and so illuminate these teaching and learning activities within educational institutions. (Parer, 1989, p. 12)

In this centennial "snapshot" of course editors in Division of Independent Study programs, it seems clear that producing high-quality course materials is a top priority and that these programs are investing in both human and technological resources to accomplish this task. Although we have no documented research with which to compare the status and activities of course editors in our study to those in previous generations, the demographics, especially related to numbers and time on job, suggest that this function is becoming increasingly important. The job may go by varying titles and have varying responsibilities, but as Markowitz (1988) suggested, "Roles are better defined than in the past, and professionals are being attracted to fill those roles."

The demographics of the respondents to our survey confirm this, especially if a profession is defined by the educational level of its participants and the nature of their relationships with other professionals (for example, university faculty). Nevertheless, our

survey indicates that the resources provided to editors for both initial and ongoing professional education and training are uneven in scope and quantity, even when size of the institution and program are taken into account. Perhaps one task for the Division of Independent Study is to explore ways of providing professional development opportunities that can be used by programs of limited as well as ample resources.

Because all the persons and institutions who participated in this survey belong to distance education programs that are part of larger academic institutions, course development practices may reflect policies and relationships of those institutions, a situation that would not exist in free-standing programs. Any one of the questions in both of our surveys could be explored further for more information or insights. It might be especially revealing to examine the perceptions about course development of university faculty who are involved in these distance education programs. How do we determine what "learner's needs" are? Are we working with a different set of criteria than faculty in the classroom? Where do we get our information? Are we "surrogate students" in helping course writers meet the needs of our students?

Our survey raises some questions about standards in course development and editing. For example, do programs having close ties with their institutions (where the institutional image is important in course production) benefit from increased support by the institution of the course development and production functions? How can those in the profession of instructional development and editing make the best sources of research and information available for the widest dissemination and urge the adoption of the most effective strategies? What is the true impact and value of course awards?

It is our hope that this study has helped to illuminate the "professional craft" of course development and editing in this last decade of the twentieth century and that it will serve as a base from which to follow the progress of the profession in years to come.

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Elizabeth Houdek
Ohio University

Centennial Anthology Project
December 1989

Nancy Gaines
University of Wisconsin—Extension

Directors' Survey

Role of the Editor/Course Developer In Independent Study by Correspondence

Please return by: January 17, 1990

*Please return to: Nancy Gaines, Independent Study, 239 Extension,
432 N. Lake St., Madison, WI 53706*

1. How many courses does your program offer?

- college credit
- high school
- noncredit
- other
- total

2. What are your annual enrollments?

- college credit
- high school
- noncredit
- other
- total

3. How long has your program been in operation?

- 0-9 years
- 10-19 years
- 20-40 years
- over 40 years

4. What is your program's relationship to your institution or university system? (Please check all that apply.)

- stand alone
 - part of a continuing education organization with delivery modes in addition to correspondence study
 - delivery system for a campus-based facility
 - other. Please describe: _____
-

5. a. How would you describe your program as to autonomy in decisions about curriculum?

no autonomy
 some autonomy
 complete autonomy

- b. Can your program reject a manuscript or require a course writer to make substantive changes?

yes
 no
 other. Please explain: _____

6. What is the total number of professional and clerical staff members in your program?

7. How many staff members perform editorial/course design functions exclusively?

male
 female

8. How many staff members combine editorial/course development/course design functions with other roles?

male
 female

9. What training/orientation does your program provide for new editorial/course development/course design staff?

10. What type of orientation do you provide for authors of study guides and other print materials? (Please check all that apply.)

writer's guide
 workshops or similar training sessions
 feedback during course development
 other. Please describe: _____

11. Does your program use desktop publishing in production of print materials?

___yes. If yes, go to Question 12.

___no. If no, do you plan to acquire DTP within two years?___

12. How long has your programs used desktop publishing?

___years

___months

13. What impact has DTP had on your program operation? (Please check all that apply.)

___realignment of staff responsibilities. Please describe.

___change in editorial/course development process. Please describe.

___change in standards of appearance for print materials

___introduction of new elements (internal graphics, new format/cover, pedagogical innovations, etc.) into print materials. Please describe.

___other. Please describe. _____

Additional comments: _____

Thank you for your help.

Elizabeth Houdek
Ohio University

Centennial Anthology Project
December, 1989

Nancy Gaines
University of Wisconsin—Extension

Editors' Survey

Role of the Editor/Course Developer in Independent Study by Correspondence

Please return by: January 17, 1990

*Please return to: Nancy H. Gaines, Independent Study, 239 Extension,
432 N. Lake St., Madison, WI 53706.*

1. How many courses does your program offer? _____
2. What is your program's annual enrollment? _____
3. How many print *jobs* does your program process/produce annually (including new study guides, reprints, revisions, and other publications)? _____
4. Editor Demographics
 - a. Gender: male female
 - b. Age: 20-30
 30-40
 40-55
 Over 55
 - c. Race or ethnicity: Asian
 Black
 Hispanic
 Native American
 White
 Other—specify _____
 - d. Your position title: _____
 - e. Job status: full-time
 part-time—specify percent of full-time
 - f. Duties and responsibilities: _____

 - g. Salary: _____ or Range: under \$15,000
 \$15,000-20,000
 \$20,000-25,000
 \$25,000-30,000
 \$30,000-35,000
 over \$35,000

h. Years in present position: _____

i. Educational background—level and field/s of education:

j. Previous work experience outside the editorial/course development field:

k. Previous work experience in editing/course development/course design:

Years: _____

5. Editor training

a. Please describe any training you received at the start of your present job:

b. Had you received any type of editorial training in a previous work or school setting?

___yes. If yes, please describe. _____

___no

6. Editorial/Course Development Functions

a. At what point does the editor/course developer enter the course development process? (Check all that apply.)

___(1) when course is being designed

___(2) before writing begins

___(3) while writing is in progress

___(4) after study guide has been written

___(5) after study guide has been typeset for printing

What is your most common entry point? _____

b. Please indicate who most often performs the functions described below in development of course materials by your program—the writer or the editor/course developer, or whether the function is shared by them. (Circle your answers.)

- (1) Course objectives are identified.
writer editor shared
- (2) Course structure is planned (written assignments, number of exams, amount of assigned reading, etc.).
writer editor shared
- (3) Textbooks and other materials are chosen.
writer editor shared
- (4) Content to be taught by textbook, by study guide, by other medium is decided.
writer editor shared
- (5) Content of study guide is organized into study units.
writer editor shared
- (6) Material to be covered by each exam is decided.
writer editor shared
- (7) Study unit objectives are formulated.
writer editor shared
- (8) Reading (listening, watching) assignments are decided.
writer editor shared
- (9) Study notes, commentary, supporting material is prepared.
writer editor shared
- (10) Self-exam/self-help materials are developed.
writer editor shared
- (11) Written assignments/evaluations are designed.
writer editor shared
- (12) Cover art and internal graphics (charts, tables, maps, half-tones, etc.) are identified.
writer editor shared
- (13) Necessary permissions/clearances are obtained.
writer editor shared

(14) Introductory material on course mechanics (lesson flow, grades, etc.) is provided.

writer editor shared

(15) Introduction to course subject matter and study suggestions are provided.

writer editor shared

(16) Study guide manuscript is edited.

writer editor shared

(17) Study guide proof is read.

writer editor shared

c. Can a study guide author override editorial decisions?

yes

no

other. Please explain: _____

d. Can editor/course developer overrule author in editorial matters?

yes

no

other. Please explain: _____

e. Have you functioned as part of a course-development team?

yes. *If yes, go on to f.*

no. *If no, go on to 7.*

f. What was your status on the course-development team?

equal member

subordinate member

team leader

Comments: _____

g. Have you been involved in multi-media (print plus one or more other media) course development?

yes. *If yes, go on to (1)-(4).*

no. *If no, go on to 7.*

(1) In what sequence were course components developed?

print first

other media first

simultaneous development

(2) Which component was perceived as of greatest importance?

- print
 other media
 no difference

(3) Did you have input into nonprint media development?

- yes
 no

Comments: _____

(4) Did nonprint media specialists have input into print development?

- yes. If yes, who (what position)? _____
 no

Comments: _____

7. Standards

a. What standard stylebook references do you use?

- Chicago Manual
 Words into Type
 MLA Style Guide
 other/s. Please list: _____

b. Indicate which of the following you use. (Check all that apply.)

- internal office style sheet
 institutional publications style sheet
 NUCEA course awards criteria
 instructional design resources. Please describe: _____

c. What considerations govern the appearance of your study guides/print materials?

(Circle one number for each item.)

	Least				Most
	1	2	3	4	5
(1) cost	1	2	3	4	5
(2) program policy/image	1	2	3	4	5
(3) institutional policy/image	1	2	3	4	5

- | | | | | | |
|--|---|---|---|---|---|
| (4) competition with textbook and other commercially produced course materials | 1 | 2 | 3 | 4 | 5 |
| (5) learner's needs | 1 | 2 | 3 | 4 | 5 |
| (6) instructional design techniques | 1 | 2 | 3 | 4 | 5 |
| (7) availability of typesetting, graphics, and printing resources | 1 | 2 | 3 | 4 | 5 |
| (8) NUCEA course awards | 1 | 2 | 3 | 4 | 5 |

8. Does your program use desktop publishing?

yes. If yes, how has desktop publishing affected your work?

no

Additional comments: _____

Thank you for your help.

Chapter 10

The Research, Evaluation, and Documentation of Independent Study

Charles E. Feasley

With the explosion of articles that describe distance education or open learning, it may be helpful to identify the distinctiveness of independent study, which is the central focus of this anthology. If one assumes that "open learning" represents the provision of one or more alternative methods of completing an institutionally planned course of instruction, then the term "distance education" would describe those alternative methods designed for courses in which the teacher is usually physically separated from the students. Independent study is that segment of distance education in which the teacher and students are usually separated in time as well as distance.

Research Trends

Topics of Research

Comparing the topics covered in this anthology with those that appeared in the *Brandenburg Memorial Essays* (Wedemeyer,

1966) is a useful way to gauge trends in research over time. The similarities in the chapter topics in the two collections of essays are surprising. Each collection contains chapters on current research, the future, nonprint media, course development, institutional role and marketing, self-evaluation and quality, international activities, and professional development. Although the earlier anthology focused almost entirely on faculty when it discussed professional development, this volume describes several kinds of nonfaculty professionals such as instructional developers/editors, media technologists, and student-support providers.

Calvert (1986) provided a helpful conceptual framework for distance education research needs by identifying three principal kinds of variables: input, process, and outcome. While both input and outcome variables can be further divided into student variables or system variables, process variables are classified as either development or delivery.

A representative student input variable might be the necessary educational background, while a system input variable could be the technological resources that are available. The Annenberg/Corporation for Public Broadcasting Project has created a number of media-based resources that are designed to improve process variables such as access to delivery and/or quality of nontraditional instruction (Mayor & Dirr, 1987). An important student outcome variable deals with how often students drop out. A system outcome variable might examine the costs or acceptance of a system that engenders a certain percentage of "dropouts." It should be noted, however, that most studies of the outcomes of particular programs are actually evaluations, not research, because they lack external validity.

Analyses of Methodology

Prior to Calvert's development of the systems-model conceptual framework, Coldeway (1982) observed that distance education was not planned, conducted, and/or reported in a systematic manner. Even though he proposed categories of research to

organize the existing distance education literature, Coldeway (1988) acknowledged that some of the categories could be called research only when all published work is considered to be research. He said in 1982 that a discussion of research methodology would have been of little value in that the selection and use of any method would have been accepted as a positive development, but eight years later (1988) he provided excellent food for thought concerning various methodological issues such as research versus evaluation, the qualitative-quantitative debate, the concept of triangulation, component research, and model building. This chapter will briefly discuss only the first two of those issues.

The intent of research is to know something in a generalizable way, while the intent of evaluation is to make a choice between options in a specific setting. Evaluation can inform choices regarding 1) what directions to revise a given program (formative evaluation) or 2) which programs among others best meet the goals of decision makers (summative evaluation). Although both research and evaluation must have internal validity (measure what they are supposed to measure), evaluation is not designed to generalize to other settings (that is, possess external validity), so it can be done less expensively than research. One of the biggest obstacles to understanding the requirements of research design in distance education is the indiscriminant use of the terms "research" and "evaluation." The indexes of major books on distance education seldom show both terms.

Qualitative Approaches

One general trend in recent research is the use of more microstudies (especially those using qualitative methodologies of anthropology and sociology) rather than macrostudies. Instead of comparing the performance of all students in campus classes with that of all students enrolled in independent study, current researchers are more likely to compare the performance of a subgroup of campus students such as part-time students over the age of 25 in a particular course with the same subgroup enrolled in independent study. In addition to the helpful distance education-focused

studies that provide an overview of the theoretical underpinnings for qualitative studies (Marland, 1989; Minnis, 1985; Morgan, 1984), there is an increasing number of distance education-based informative studies conducted that way (for example, Marland, Patching, Putt, & Store, 1984; Morgan, Taylor, & Gibbs, 1982). A less well-known approach to research is the single-case experimental design, which can offset most of the limitations of between-group designs such as individual outcomes being obscured in group averages (Murphy, 1986). Coldeway (1988) made a good case for employing both quantitative and qualitative methods.

Quantitative Studies

Merriam (1989) argued that qualitative research in education is coming of age because the literature is no longer preoccupied with justifying the use of qualitative methods, but Moore (1985) expressed concern that the pendulum has swung too far away from quantified research since an experimental approach is often rejected (in favor of more popular qualitative approaches), even when an experiment may produce the more generalizable result.

Regardless of whether they consider the amount of quantitative research being conducted now as too much or too little, both practitioners and researchers may find value in past studies. When one hears that a particular institution has attained a certain desirable outcome (such as a high graduation rate), a detailed statistical digest or case study of that institution at one point in time may help determine the applicability of its methods to one's own institution or research hypothesis. For example, because of the Open University's (United Kingdom) world leadership role in distance education, researchers frequently use its digest of statistics (1981) to understand its system. Even more useful are reports for the same institution at different points in time. For example, the Open University has studied carefully the demographic composition of individuals who have applied for admission, enrolled, or graduated (Morrison, 1986; Slee, 1987).

A broader context for comparison is available in statistical studies that provide a picture of multiple institutions at the same point in time. For example, international survey data such as provided by Holmberg (1985) allows one to question the attention that has been given to the team approach to course development, which is used at only 38% of the more than 200 responding institutions (Feasley, 1990).

Even more opportunities for comparison are possible by using a series of similar reports on multiple institutions at multiple points in time. For example, the Independent Study Division of the National University Continuing Education Association (NUCEA) has published the results of annual surveys of student enrollments, college fees, and faculty stipends. Although some of these individual reports include analysis of trends over time, it is possible to gain access through the ERIC system to complete annual reports for the past nine years, most of which are referenced in a recent report in that annual series (Feasley et al., 1989).

Meta-research

This chapter briefly discusses the research on research (meta-research) studies in distance education. In 1989 the Independent Study Division of the NUCEA awarded its Elizabeth Powell Award for excellence in a nonbook-length publication to a meta-research study by Jocelyn Calvert. Calvert observed that distance education research is the place where scholarship and practice meet. Scholarship that offers critical appraisal of practice addresses issues, she said, through three approaches: practical and descriptive studies that give little attention to conceptual underpinnings; application of conceptual models from related disciplines; and construction of an independent structure and theory for distance education distinct from other forms of education. A major limitation of descriptive studies stems from their infrequent references to work done elsewhere, making them context specific. Besides the use of more citations to other work, Calvert advocated isolating factors that have been studied across regional and cultural boundaries.

Because distance education is a field that draws its professionals from a variety of disciplines, Calvert viewed the second research approach of applying the theories and methods of related disciplines as potentially popular and particularly fruitful. The first of two stages in this approach is the analysis of a research area in the context of distance education. Among the examples she gave are Bååth's (1982) review of teaching theories and Thompson's (1984) assessment of field dependence within students' approaches to studying. The second stage of the approach is actual research employing the principles of another discipline. Among the examples given are Sweet's (1986) use of Tinto's model of student attrition and Harris's (1987) application of critical theory to selected elements of the British Open University system. Unfortunately, Calvert noted, there seems to be less subsequent debate, replication, and refinement of such studies than is customary in other fields of study.

The third research approach, treating distance education as a separate discipline, originated for several reasons, including the establishment of a research tradition and curriculum of study (Holmberg, 1986a). Although some individuals, such as Perraton (1987), have identified testable propositions concerning distance education in the areas of teaching, administration, and assessment, Calvert argued for the independent development of basic principles before looking for applicable theories. She also predicted increasing convergence between distance education and mainstream teaching-learning systems.

Distance Education as a Similar Field of Study

Moore (1985) described a closely related area of research, adult education, as an excellent model for the life-cycle evolution of distance education as a new field of study. Although the infancy stage of each field is preoccupied with immediate research gratification for the everyday problems faced by practitioners, he noted that the childhood stage emphasizes description of such practitioners and the surrounding world. In the next stage, adolescence,

a body of theory is formulated for that field of study, and adulthood is characterized by a concern for testing and refining of theory.

Distance Education as a Separate Discipline

In the first issue of *Distance Education*, Ljoså (1980) observed the growing worldwide body of literature on distance education but acknowledged the continued validity of Childs' comment in 1969 that research had not achieved notable success in the correspondence study field. While recognizing that distance education was a distinct research area, Ljoså advocated continued contact with related areas such as adult education, media, communications, and nonformal education.

During the 1980s, distance education became a separate discipline (Holmberg, 1984, 1986a, 1986b; Willmott & King, 1984) that comprises the following areas:

- philosophy and theory of distance education; distance students, their milieu, conditions, and study motivation;
- subject-matter presentation;
- communication and interaction between students and their supporting organization (tutors, counselors, administrators, other students);
- administration and organization;
- economics;
- systems (comparative distance education, typologies, and evaluation); and
- history of distance education (Holmberg, 1986a).

However, toward the end of the 1980s, writers increasingly noted the harm done to distance education as well as to education generally by exaggerating perceived differences among dis-

ciplines (Garrison, 1989; Smith & Kelly, 1987). Although methods may differ, the educational transaction is said to be the same.

Limits to Research

After recognizing how various authors (Bååth, 1978; Holmberg, 1977; Ljoså, 1978; Peters, 1971) have criticized educational researchers for paying scant attention to distance learning, Coldeway (1982) identified some of the factors limiting the role of research in this area:

- educational researchers are rarely present during the design of distance learning systems;
- there is no clear paradigm for research in distance learning, and it is difficult to attract funds to develop one;
- there have been no consumer groups or publication outlets for such research (although this is changing);
- some institutions are averse to defining boundaries and variables clearly because practitioners work with macro-level variables (such as tutoring) and fear that breaking them down into components will complicate the phenomenon;
- educational researchers often ask questions of no practical, or even theoretical, relevance. The tendency to ask, "What happens when you try this?" diverts them from the more important issue of "How do you make this happen?" (Geis, 1980); and
- researchers in distance learning test variables that are really classes of variables (such as comparisons of distance and classroom learning). The results are impossible to replicate and of dubious utility anyway.

After making those observations, Coldeway and others have noted considerable progress in reducing many of those limiting factors. The documentation of distance education illuminates this process.

Documentation

Regular readers of the *New Accessions List* of the International Centre for Distance Learning (ICDL) acknowledge the worldwide leadership that its small staff provides for documenting distance education. Although ICDL is located on the main campus of the British Open University, all of its direct funding comes from worldwide organizations such as the United Nations University and the International Council for Distance Education (Harry, 1988). As a result, ICDL is able to respond more flexibly to proposed collaboration projects than if it received considerable funds from a single host institution.

Since most of ICDL's users are from overseas, the ICDL staff has been able to identify the adequacy of documentation centers and databases throughout the world. For example, although distance education practitioners use a large proportion of unpublished or semi-published documents and the American-based ERIC (Educational Resources Information Center) database is the world's major educational bibliographic service (which specializes in such "gray" literature), only a small proportion of that gray literature on distance education is said to be in ERIC. There are two main reasons for this situation. First, unless documents are sent to ERIC clearinghouses, it is hard for ERIC staff to discover what is being produced. Second, it is ERIC policy to be highly selective of documents that it is not able to reproduce. The lack of standard indexing at the decentralized clearinghouses encourages experienced users to search under every possible related descriptor to try to ensure that the database has been properly searched (Harry, 1988). This prompted Feasley (1987a, 1987b) to prepare indexes to the distance education reports and periodicals in the ERIC databases,

although useful analytical reports had been prepared on distance education by two individual ERIC clearinghouses (Feasley, 1983; Zigerell, 1984).

Retrospective reviews of early issues of some distance education journals and newsletters are available to help scholars gain historical perspectives on various issues. For example, the first issue of *Distance Education* provided readers with a survey of articles from *Teaching at a Distance* (Grugeon & Tibbenham, 1980) and the *Australian and South Pacific External Studies Association Newsletter 1974-1979* (Mitchell, 1980). Subsequent issues of *Distance Education* have also often included an "In Retrospect" section in which current readers are alerted to reviews of older studies, particularly those which appeared in languages other than English. The Appendix to this article lists many current periodicals related to independent study.

After reflecting on the variety and value of articles contained within the *International Council for Correspondence Education Newsletter* (forerunner to the *International Council for Distance Education Bulletin*), Holmberg (1989) acknowledged the difficulty in accessing either copies of the *ICCE Newsletter* (published from 1970 to 1982) or the more extensive ICCE conference proceedings (begun in 1938). Although some of the proceedings can be found in the ERIC system (Daniel, Stroud, & Thompson, 1982; Granholm, 1976; Ljoså, 1975; Wentworth, 1978, 1979), most of them cannot. It would be helpful if ICDE officials expanded the visibility of their group by disseminating information more completely through the ERIC system.

Some improvement is evident in another area. Because many distance education/independent study reports are locally published, serious researchers must locate descriptions of ongoing research institutes and their projects and make periodic inquiries about the results of their efforts. For example, each issue of the *New Accessions List of the International Centre for Distance Learning* includes recent items from the British Open University, but a better picture of the scope of that institution's remarkable research is provided in bibliographies of individual internal units such as

the Institute of Educational Technology (Edwards, 1988; Whitehead, 1984, 1988). Although researchers have always monitored various distance education journals and newsletters in order to find even brief references to ongoing research projects, they now have a periodical to help them collect such information more directly—*Research in Distance Education* (Rubin, 1989). Until the arrival of that new periodical, most research institute descriptions had been found in sources difficult to access in the United States (Harry, 1985; Moore, 1985; Raggatt & Crooks, 1980; Raggatt & Harry, 1984; Rumble & Harry, 1982).

U.S. contributions to international journals and associations have diminished noticeably during the past 25 years compared to the previous 25 years (Feasley, 1985), but the recent emergence of excellent periodicals in both Canada and the United States should reverse that long decline. Although the Independent Study Division of the NUCEA has spent several years establishing a documents archive at Pennsylvania State University, as well as surveying and interviewing early leaders in the field, the international impact of such contributions will be greatly diminished unless copies of those materials are also deposited in a documentation system (such as ERIC) that provides easy international access.

Future Directions

Because investigations of independent study and distance education during the past 25 years have studied many of the same topics using diverging but improving methodologies, it is likely that many future studies will employ meta-analytical procedures in order to build on earlier studies. As additional well-designed studies are completed on topics that have been researched for many years, it becomes possible to assemble a critical mass of generalizable findings. Recent writings on the techniques of meta-analysis allow determination of the effect sizes of various treatments. The resulting measurements of the effectiveness of various types of administrative or instructional treatments enable the

development of empirically derived theoretical patterns, which can be subjected to further research and refinement.

While the debate continues about whether distance education is a separate discipline, advances in telecommunications will speed up national and international cooperation in both research and documentation and help fuel that debate. Ironically, computers will bring about more standardized as well as more individualized research and evaluation. Because it is possible to import (download), via a floppy disk or telephone modem, data-collection instruments that other individuals have prepared on their computers, it is not difficult for the administering institution to use the standardized format and content of any uncopyrighted instrument while adding appropriate local references to its use. Once such an instrument has been downloaded, it can be easily modified with word-processing software into versions that are individualized for specific courses and/or conditions of administering the instrument. The quick sharing of various instruments via computer telephone modems along with the use of powerful, yet commonly available, statistical-analysis software, will greatly facilitate joint research projects and publications (some electronic), even among individuals who represent diverse academic disciplines. By enabling students to use computers to receive initial instruction, participate in instructional interactions, and take tests to measure learning, it becomes easy to collect information about the duration, frequency, and effectiveness of students' learning patterns. However, theory building must accompany expanded data collection. Both computers and telecommunications should provide greater access to the documentation of such theory-based research and evaluation.

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Appendix

*Periodicals Related to Independent Study*¹

About Distance Education (now *News About IEC*)

International Extension College, 18 Brooklands Avenue, Cambridge, England CB2 2HN, UK.

Academic Computing

P.O. Box 804, McKinney, TX 75069, USA.

Adult and Continuing Education Today

1554 Hayes Drive, Manhattan, KS 66502, USA.

Adult Education Information Notes

UNESCO, 7 Place deFontenoy, 75700 Paris, France.

Adult Education Quarterly

AAACE, 112 16th St., NW, Washington, D.C. 20036, USA.

Adult Learning

AAACE, 112 16th St., NW, Washington, D.C. 20036, USA.

American Independent Study

Center for Credit Programs, 116 International Center, University of Iowa, Iowa City, IA 52242, USA.

American Journal of Distance Education

403 South Allen Street, Suite 206, The Pennsylvania State University, University Park, PA 16802, USA.

AADEP Newsletter (Australasian Association of Distance Education Principals)

Mrs. Carlotta Green, NT Secondary Correspondence School, P.O. Box 40471, Casuarina, Northern Territory 0810, Australia.

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CET, 3 Devonshire St., London W1N 2BA, UK.

Canadian Journal of Educational Communication

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NUCEA, Suite 615, One Dupont Circle, Washington, D.C. 20036, USA.

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720 Bathurst Street, Suite 500, Toronto, Ontario, M5S 2R4, Canada.

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Bob Spencer, Centre for Distance Education, Athabasca University, Box 10,000, Athabasca, AB, T0G 2R0 Canada.

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Valkenburgerweg 167, P.O. Box 2960, 6401 DL Heerlan, The Netherlands.

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Edu

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51 Sugar Hollow Road, Danbury, CT 06810, USA.

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Kogan Page Ltd., 120 Pentonville Road, London N1 9JN, UK.

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ICEM/CIME Secretariat, c/o R. Lefranc, 29 rue d'Ulm, 75230 Paris, Cedex 05, France.

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730 Broadway, New York, NY 10003, USA.

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NKI—skolen, Box 10, N-1321 Stabekk, Norway.

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Liz Burge, Instructional Resources Development Unit, Ontario Institute for Studies in Education, 252 Bloor St., Toronto, Ontario, M5S 1V6, Canada.

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School for Independent Study, Holbrook Road, Plaistow, London E15 3EA, UK.

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401 LSE, Oklahoma State University, Stillwater, OK 74078, USA.

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AAACE, 1112-16 St. N.W., Suite 420, Washington D.C., 20036, USA.

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1900 Frost Road, Suite 101, Bristol, PA 19007, USA.

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Anna Nichols, NCET, 10 Metuchen Way, Hedge End, Southampton, SO3 4JZ, UK.

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Jason Ohler, Editor, Educational Technology Program Director, University of Alaska Southeast, 11120 Glacier Highway, Juneau, Alaska 99801, USA.

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Open Campus

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UNESCO, 7 Place deFontenoy, 75700 Paris, France.

Research in Distance Education

Centre for Distance Education, Athabasca University, Box 10,000, Athabasca, Alberta T0G 2R0, Canada.

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71 Spruce St., Acton, MA 01720, USA.

Tel-Cons

Applied Business Telecommunications, Box 5106, San Ramon, CA 94583, USA.

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Virginia A. Ostendorf, P.O. Box 2896, Littleton, CO 80161-2896, USA.

United Nations University International Center for Distance Learning New Accessions List

The Open University, Milton Keynes MK7 6AA, UK.

ZIFF Papers

FernUniversitat, P.O. Box 940, D-5800, Hagen, FRG.

Chapter 11

Strategies for Improving Instructional Design

Morris Sammons

Much has been done during the last twenty years to improve the instructional design of independent study courses and printed materials. A good deal of this work has been aimed at deeply engaging the learner in the subject material at the level of critical analysis, synthesis, and application so that it is comprehended and retained better. More can be done to accomplish this goal. Strategies for processing printed material based on ideas from information-processing theory and cognitive psychology can be used in the design of instructional materials. These strategies have been effective in improving comprehension and retention in reading. Moreover, these strategies have been shown to promote further learning when adopted by students themselves. In this chapter, I shall explain these strategies and show how they can be worked into printed instructional material and used in independent study to engage learners in the subject matter.

Processing Material by Reading

Learning through independent study is a difficult way to learn, partly because the responsibility for determining how to

learn is the individual student's. He or she must decide how to extract the important ideas from the course materials and how to retain them. Most successful learners in independent study are self-directed and have strong study skills. They begin by knowing that they have to figure out how to get the important meanings and retain them.

In figuring out the meanings, the learner is processing the material. I want to focus special attention on this processing. Carrying out this process is the learner's first major responsibility in independent study. In standard independent study courses—those consisting primarily of textual materials and a course study guide—the processing of the material is done through reading. Therefore, how a learner reads and how the materials guide this reading will directly affect the learner's comprehension of the material.

Constructing Meanings

In cognitive psychology, reading is considered a process of constructing meanings (McNeil, 1987). The reader's ideas fix the meanings of the words read. The words represent or express meanings in the writer's mind. They are the medium used to transmit meanings. What the writer means by the words is based on his or her ideas and experiences. What meaning the reader receives from the words also depends on his or her ideas and experiences.

The same is true in an independent study situation. The materials are all concrete expressions and representations of the author's ideas (Baecker & Buxton, 1987; McNeil, 1987). The author constructs the pieces of the course, that is, chooses certain texts, prepares certain comments to the learner, and develops certain kinds of exercises, in order to have the student understand the material as the author thinks it should be understood. Though the author can provide aids for grasping the appropriate meanings, the materials mediate between what the author means and

what the learner understands. The learner uses his or her ideas to determine the meaning of the material.

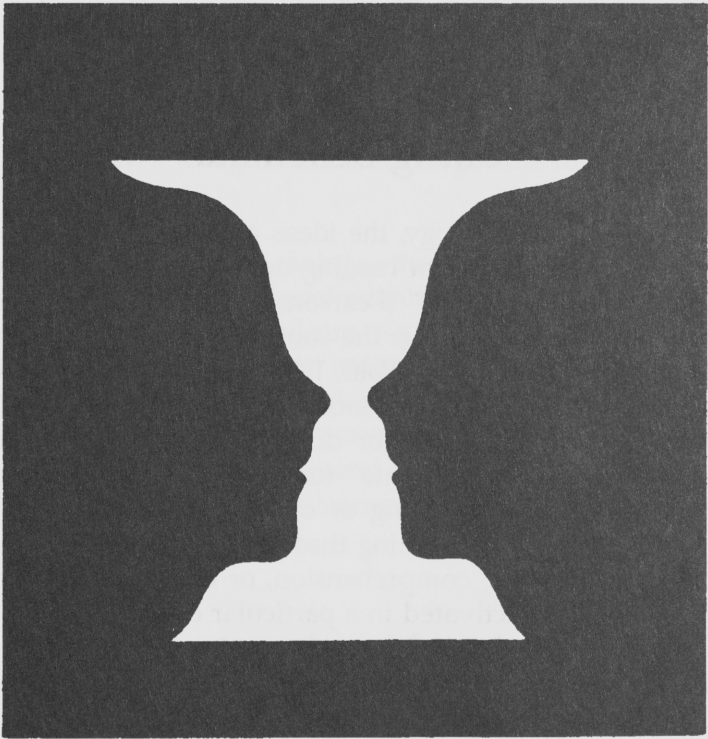
Using Schemata

In cognitive psychology, the ideas and experiences one uses to construct meanings from reading and all other cognitive processes are called “schemata” (Pearson, 1982). Schemata determine perception, and perception is the construction of meanings of an experience (West, Farmer, & Wolff, 1991). Schemata determine how we organize ideas and experiences (Anderson, 1980). There are different types of schemata for different types of knowing, for example, “procedural schemata” for ways of knowing how, and “state schemata” for knowing of or about objects (West et al., 1991). According to the learning theories of cognitive psychology, there is no perception, comprehension, or learning without schemata available and activated in a particular context.

To see how schemata work, consider the following examples often used in psychology texts. First, look at Figure 1. What do you see? Two people facing each other—or a vase? In Figure 2 do you see an elderly woman or a young woman? How you perceive these different objects in the picture depends on the schemata you have.

Now, consider three other examples. If I played a Beethoven symphony for you, would you hear the sonata allegro form? You probably would not unless you knew something about music and the structure of symphonies. If someone said to you, “He slapped a frozen rope just to the right of the second sacker,” would you know what the person meant? If you were familiar with baseball slang, you would understand.

And finally, there is one other often used example. If someone said to you, “The seams were split, so the notes were sour” (West et al., 1991, p. 15), what is that person talking about? What meaning does it have for you? When you read the name of the object, the sentence will make sense to you. The name of the ob-



E. G. Boring (1930)

Figure 1.

ject involved is a set of bagpipes. By connecting the sentence to this object, the sense of the sentence becomes clear. A context is given for the sentence, a schema is recalled into which the meaning of the words of the sentence fit.

This case is analogous to the independent study situation in which the learner must determine the meanings in context. Without a context, the meanings will be difficult to discern. In each of the examples, understanding or comprehension comes from having the schema required to process the words and their context.



D. A. Bernstein, et al. (1988)

Figure 2.

Introducing Learning Strategies

In applied research on reading, specific techniques have been developed to promote reading comprehension. The techniques encourage readers to reflect on what meanings the words have for them and on how the ideas are organized and related—the context of the ideas. They analyze and synthesize the material and carefully consider what schemata are involved with the ideas. The readers are prompted to view the material from the writer's schema, thereby coming closer to the writer's meaning.

The techniques were developed by carefully examining how successful students learn and how they use cognitive strategies to process material for understanding and retention. Some of these strategies, cognitive psychologists determined, can be incorporated into the structure of the reading material to help learners process it. Other strategies can be taught to the students, who then systematically use them to learn how to process material and analyze it effectively. This technique is called "metacognition" (West et al., 1991).

One of the structural strategies is the "advanced organizer" (West et al., 1991). By introducing the main thesis of a section at the beginning and clarifying its meaning, the learner can process the section easier. This is not a new idea; it originated with the psychologist Ausabel (1968). It is one of several techniques used to "bridge" from old knowledge to new. Bridging techniques enable learners to "apply their prior knowledge to new information in relatively systematic ways" (West et al., 1991, p. 32).

An example of an interactive strategy is "reciprocal teaching" (West et al., 1991). The teacher asks the learner questions designed to elicit clarifications of meanings and summaries of the material being studied. After several practice efforts, the learner in turn questions the teacher about some material and thereby learns to use the strategy.

Spatial Learning Strategies

I want to focus attention on the "spatial learning strategies" (West et al., 1991). Although all the strategies could be useful in independent study, spatial learning strategies are especially important because they can be designed into the instructional materials, such as the course study guide, to facilitate processing of the reading material. More importantly, they can be designed into learning aids and exercises in such a way that the student can learn to apply them in future learning situations. Spatial learning strategies not only facilitate comprehension and retention, but they

also prompt further learning. Designing them into instructional materials assists the learner, and that is why they are so important to independent study.

Concept Maps

I want to briefly explain three spatial learning strategies and describe how they could be used in independent study. The first type of strategy is called a "concept map" (West et al., 1991). Similar in some ways to the standard outline of information, concept maps can take on many shapes. An organizational chart (see Figure 3) is an example of a hierarchically ordered concept map. The ideas flow in descending order as topics or subcategories are shown to be related to each other and to the main idea at the top. A flow chart of an operation or procedure is another form of concept map. All forms of concept maps are good for diagramming the important ideas of material so that not only the ideas but also their relationships to each other can be seen. They are especially helpful in initially comprehending material.

Compared to outlines, concept maps have several advantages. Though both isolate and organize concepts, outlines can only be hierarchical and linear. Concept maps can have several configurations because they portray numerous interrelationships and interconnections, for example, spider maps (see Figure 4). Figure 4 is a map showing some of the kinds of maps that can be used. The shape of the map depends on the relationship being diagrammed.

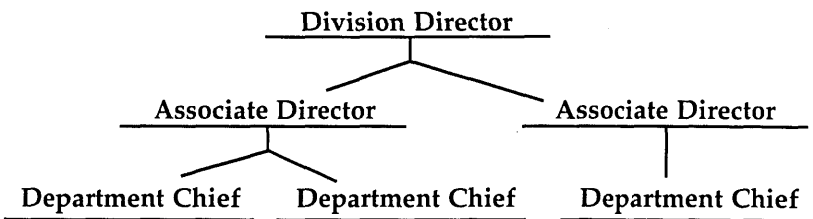


Figure 3.

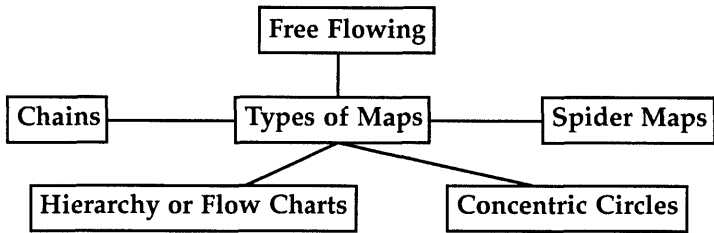


Figure 4.

Maps can be done almost intuitively, according to how one sees the ideas fitting together. Because of this, the relationships being diagrammed can be more easily expressed or illustrated. This feature generates another advantage. Concept maps and the ideas they express can be easily visualized. They more easily capture the concepts and their relationships in one whole that can be remembered. Figure 5 shows three chain maps of the kinds of relationships that can be illustrated using concept maps.

There are three basic steps to developing concept maps. First, identifying key concepts. Second, plotting a relationship. The logical relationships of the ideas usually suggest the form or shape to use. This is the real strength of concept maps. The visual image is an analogue to the logic of the ideas as perceived by the originator of the map. The third and last step is the naming of the relationship (see examples of relationships in the maps in Figure 5). Even if you can perceive the existence and form of the relationships, it still may be difficult to name them. However, once a label has been fixed, the diagram is complete, and recalling it enables you to recall the whole set of ideas.

Type 1 Frames

The next type of spatial learning strategy is the "type 1 frame" (West et al., 1991). These are grids or matrices and are usually two-dimensional. General concepts or main ideas are presented in rows and columns (see Figure 6). Special information is put in the slots. Any type of information can be diagrammed.

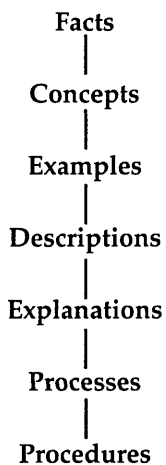
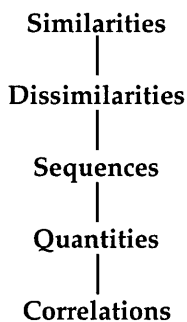
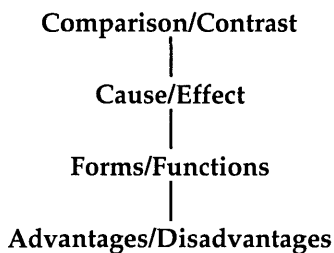


Figure 5.

Study guide for Psychology x230—Perception and Sensory Processes
(Tom Wilson, 1990):

“What are the three most common stimuli used in visual perception experiments?”

	Stimulus 1	Stimulus 2	Stimulus 3
What is it?			
How is it used?			
How does it differ from the other two?			

Figure 6.

Type 1 frames present a coherent structure within which details can be organized. A large number of connections among details of specific cases and more general concepts can be diagrammed and displayed. They effectively reveal the imbedded structure in highly organized subject matter and focus attention on the specific details of a particular case. Because material can be arranged in this way, type 1 frames make assimilation of detailed material easier. They are particularly useful with scientific material. The categories that make up one side of the grid are usually common or known ideas. By placing the specific examples of less-well-known ideas in the grid, the relationships are fitted to an existing schema—they are assimilated.

To construct type 1 frames, the main ideas of the material or portion of the material being highlighted compose one side of the grid or matrix. Next, the specific examples of the ideas are designated. Then, the relationships among the highlighted ideas and their examples are carefully examined for formulating categories of relationships. These ideas compose the other side of the grid (see Figure 7).

Indian Tribes	Homes	Food	Language	Religion	Social Structure
Apache					
Comanche					
Algonquin					

Chlorides	Elements	Characteristics	Compounds	Uses

Primary Organs Vulnerability of the body	Function	Location	Connections

Figure 7.

Type 2 Frames

The difference between type 1 frames and "type 2 frames" (West et al., 1991) is a subtle one. They do not look very different (see Figure 9). The difference is that type 2 frames are directed toward the elaboration of a general idea to which all the specific examples and all the categories are related. For example, look back at the examples of type 1 frames in Figures 6 and 7. If the point of the material is to relate categories noted on the top of each grid to a more general idea, then these would be type 2 frames. The difference between the two is not so much in their form as in their use (see Figure 8).

The difference between type 1 frames and type 2 frames is in their use. Type 1 frames are used with particular cases, instances, or items. Look again at Figure 7. The open columns are to be filled with details characterizing the particular items on the left. The details can then be indicated. This is the primary purpose of type 1 frames. Type 2 frames are used to focus attention on a general idea (or ideas) that is suggested or illustrated by the in-

Study guide for Psychology x230—Perception and Sensory Processes (Tom Wilson, 1990):

"How does the increased complexity of a neural circuit affect its response?"

	Description	Response to increased stimulation	Information processed
Linear circuit			
Circuit with convergence			
Circuit with inhibitory synapses			

Figure 8.

War	Social Conditions	Economic Conditions	Political Conditions	Trade	Foreign Affairs
WWI					
WWII					
Korea					
Vietnam					

Figure 9.

formation placed in the open cells. This idea concerns the relationship of the ideas given at the top and left side, the ideas defining what is to go in the cells. Thus, the frame in Figure 8 is used to compare the responses, given three types of increasingly complex neural circuits named on the left. The purpose of the frame is not simply to give the details of responses of complex circuits, but to focus on the relationship of the kinds of responses given to the kind of circuit. The purpose is to illustrate the relationship between the complexity of a neural circuit and the response the circuit gives to stimuli.

The purpose of type 2 frames is to prompt thought about relationships. With type 2 frames, learners use higher-order thinking skills such as analysis, synthesis, criticism, and application. They are usually used to prompt critical analysis of material and rethinking of the relationships of items involved.

When one works with type 2 frames, there are two issues to remember. They do not work well with unstructured material, ideas that have no logical connections, or with material that emphasizes specific, concrete items almost exclusively. However, type 2 frames do work well with inaccurate information as long as the information is reviewed and analyzed. In fact, the process of reviewing and analyzing inaccurate information can provide important feedback to the learner.

Using Spatial Learning Strategies in Course Study Guides

Several features of spatial learning strategies make them useful in independent study. First, they can be used with printed material to effectively aid processing, comprehension, and retention. No teacher needs to be present for their use.

The strategies could be added as assigned exercises. For example, after appropriate explanation of a concept map, learners could be asked in an assignment to construct a concept map of the material in the chapters read for the lesson. Similarly, learners could be assigned the task of completing the slots of a type 1 frame. Learners could also be asked to construct a type 1 frame for a segment of material. With type 2 frames, learners could construct a frame explicating the relationships of the particular ideas related to a general principle. Learners could also be given a type 2 frame and asked to critically analyze the relationships illustrated.

The author of the study guide could integrate the use of strategies into the study guide, or an instructional designer could do this after the material has been prepared by the author. The instructional designer could work with the author or develop the strategies alone after becoming familiar with the basics of the material. The author could check the validity of the concepts used and of their relationships, but the actual construction of the strategies could be done by an instructional designer.

The most important feature of the spatial learning strategies is that they can be learned by students. After some explanations and practice in other lessons, learners could be assigned to construct a concept map, type 1 frame, or type 2 frame. In other lessons, learners could be encouraged to use maps or frames to process the material. As students practice and become proficient with these strategies, they will also learn how to facilitate their own learning—to learn how to learn.

Incorporating spatial learning strategies into independent study course materials is not difficult. It need not be done by the

content expert. Using these strategies will help independent learners process, comprehend, and retain material. In the case of type 2 frames, learners can be taught to use higher-order thinking skills. By engaging the material, students can learn how to engage themselves.

Conclusion

In independent study courses that use textbooks and course study guides, the function of the study guide is to direct and facilitate learners' thinking as they move through the subject matter presented in all the materials, including videotapes, audiotapes, or computer programs. One of the primary goals of course design and development is to prepare the study guide and to organize the material to assist (and, if possible, prompt) active learning. The goal is for learners to engage the subject matter. Rather than focusing on learners' ability to answer certain questions or perform certain exercises correctly (as learning is conceived in behavioristic psychology), the goal for cognitive psychology and the rationale for using the strategies is to have learners use higher-order thinking skills such as critical analysis, synthesis, and application and to thereby incorporate the material into their own knowledge base.

Learning from textual materials and course study guides involves reading. Much research has been done on reading based on the ideas and theories of cognitive psychology. (For some examples of this research, see the studies cited in the references for this paper.) Through this research, techniques have been developed to improve comprehension and retention. These techniques or learning strategies can be used in independent study courses; they can be designed into the course study guide.

Most reading research has been directed at improving children's ability to comprehend and retain written material, but the cognitive processes involved are the same for children, college-age young people, or adults. Therefore, the strategies should be effective for independent study students. Given their promise

for improving learning, they should be used more, and more research should be conducted on their use. In addition to the intrinsic value of improving learning in independent study, there are practical matters to be considered.

At least three conditions affecting our society and education make improving independent learning important. First, the demand for knowledge continues to increase. As people live longer and as knowledge continues to change, lifelong education will be required for anyone who wants to have current knowledge and skills. Many people will not have the ability or the means to engage in traditional, classroom-based experiences. Nontraditional programs will provide needed and valuable opportunities. Improving independent learning will attract more people to this method.

Second, the subject matter of the basic disciplines has expanded and become more complex. Since many courses offered through independent study are introductions to the basic disciplines, the scope of these courses is increasing and the material is more complicated. Improving the conditions for independent learning will facilitate mastery of these more difficult introductory courses. And, facilitating independent learning will help maintain independent study as a viable alternative to traditional classroom-based study for those people who cannot attend courses on campus.

As our population demographics are transformed, the clientele of independent study will change. Current demographic profiles indicate that through births and immigration, our society will become more diverse during the coming decades. The percentage of the population from ethnic minority groups will increase. At the same time, better-paying jobs will require more education and sound educational backgrounds. Nontraditional options such as independent study will help provide these opportunities and help more students to be successful.

There are several reasons, then, to improve independent study learning. Using spatial learning strategies has been shown to in-

crease reading comprehension and retention by prompting learners' deep processing. The strategies can be designed into study guides without altering the guides' form or function, and the designer does not need content expertise. Therefore, spatial learning is an effective way to facilitate comprehension and retention and to prompt further learning.

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Chapter 12

The Institutional Context for University Independent Study

Robert G. Simerly

A familiar lament by providers of independent study is that the parent institution does not fully appreciate or fully recognize the unique role that independent study plays in the educational process. In addition, we sometimes feel that independent study has a lower institutional priority than other forms of distance education that may attract more attention because they have more political appeal. This chapter will explore the institutional context for independent study, how that role is changing, and what specific steps independent study professionals can take to promote these changes so our programs can remain strong and responsive to client needs.

Independent study has a long and proud history as an alternative to face-to-face classroom instruction. Independent study has been, is, and will continue to be a viable alternative to completing course work for many people who are unable to participate in traditional instruction due to geographic isolation or schedule conflicts.

Because of the success of the independent study format, development and presentation of curricula materials have become

highly refined at some institutions. Today, traditional independent study formats are often enhanced by the skill of instructional technologists and curriculum-development specialists who produce materials embodying the best of what we know about effective presentation of learning materials.

Today independent study is poised on a new frontier of change unprecedented in the history of education. Many of our technologies and instructional strategies were not readily available as recently as ten years ago. The rate of change and introduction of new technologies is so rapid that often only three or four years elapse between the introduction of these technologies and their adoption by the educational community. Among these new technologies are:

- interactive video discs;
- interactive personal computers;
- compact discs;
- low-cost optical-scan scoring sheets;
- new computer software, most notably Hypercard and other similar software that is revolutionizing the possibilities of enhancing the interactive instructional process;
- access to satellites for the instant transmission of data;
- new forms of connectivity and networking among data banks of educational information; and
- the introduction of a new system of electrical wiring currently called the "Smart Home," which will enable all buildings to become decentralized educational centers capable of instantly accessing large, sophisticated data bases.

To borrow from Dickens, it is the best of times and the worst of times. Independent study is poised on the edge of the new frontier of educational technology. Decisions that independent study leaders make will determine whether our higher education organizations remain responsive, whether we can adapt to pro-

vide new types of programming, or whether we will retreat to view the world from a defensive position with this lament: "As soon as the institution realizes our unique contributions to the educational process, we will be able to do a better job."

The Institutional Context

Myths and Realities of Institutional Support

As independent study providers, we must come to terms with the degree to which independent study is viewed as central to the mission of our institutions. Organizations rarely support the activities of subunits unless these subunits actively lead in developing strategies that demonstrate how they contribute to the central mission of the parent organization. This issue of centrality is critical to analyzing the present and future directions of independent study.

Developing strategies to fuse independent study to the central mission of the parent organization is critical to the survival, growth, and success of the independent study format. This is the primary challenge to independent study leaders in the decade of the 1990s. Eight basic issues need to be considered when developing strategies to address the centrality challenge. These are:

1. Avoiding the "Poor Me" syndrome and conquering anomie.
2. Creating strategic alliances with key stakeholders.
3. Developing measurable accountability methods that are accepted by traditional academic departments.
4. Achieving academic legitimacy in ways recognized by the body politic of the parent institution.
5. Emphasizing quality, excellence, and service.
6. Supporting the traditional organizational culture when planning change.

7. Implementing strategies designed to fuse the independent study format to classroom instruction.
8. Finding effective ways to publicize the success of independent study in helping the parent organization achieve its mission.

Avoiding the "Poor Me" Syndrome

It is easy to fall into the "Poor Me" syndrome. This occurs when we feel that our areas of speciality are taking second place to those of others. For example, a common "Poor Me" syndrome among independent study professionals is that the parent institution does not afford independent study the attention and respectability it deserves. Thus, it is easy to get caught in the trap of thinking, "As soon as *they* (whoever this indefinite pronoun happens to be) appreciate me more and give me more recognition, I will be able to do a better job. However, until that time, I will suffer in silence (and bitterness) until someone recognizes how wonderful I am and how valuable my programs are."

Our colleges and universities are dynamic, changing environments of stakeholders, all of whom are lobbying for recognition, additional resources, and kudos. Rarely does the parent institution suddenly wake up to perceive the error of its way and say, "How could we have been so neglectful? Let's start giving independent study more attention, more resources, and a stronger role in achieving our mission." This simply does not happen. Instead, stakeholders continue to lobby, jockey for position, and try to influence the key opinion makers with both assertive and subtle approaches.

The Problem of Anomie

People suffering from the "Poor Me" syndrome are usually experiencing what sociologists call *anomie*. Anomie is a term describing the underlying causes of human behavior when people

feel powerless to make the impact they would like. Anomie is different from apathy. People experiencing apathy do not care about issues. People experiencing anomie care, but they feel powerless to make changes. Yet the outward behavior and feelings associated with these two conditions are often perceived to be the same: withdrawal, a feeling of weakness and second-class citizenship, a feeling that the grass is greener in someone else's yard, a feeling that more powerful people control our destiny.

How We Can Overcome Anomie

Anomie can be a debilitating experience not only for individuals experiencing it, but also for the institution employing such people. Rarely do institutions change their course of action toward people experiencing anomie. Instead, institutions usually keep forging ahead with many of the same response patterns of the past, which tend to reinforce and intensify feelings of anomie.

It is possible for individuals, however, to overcome feelings of anomie and develop successful, action-oriented strategies for change. Here are some of the things that independent study professionals can do to overcome the feelings of anomie that sometimes occur.

Ten Action-oriented Steps

The following are suggestions for action-oriented steps to take to overcome that sense of powerlessness. Such steps are designed to put independent study professionals in control of their own destinies within the institution. They are assertive steps that originate within independent study staffs. And they are all designed to highlight publicly the role that independent study plays in helping the parent organization achieve its mission. Thus, they actively address the centrality issue.

1. Develop strategic alliances. In an organization in which the product is information and education, developing strategic alliances with other providers is essential. Here is a specific strategy that addresses this issue:

- Work with academic departments to develop new independent study instructional modules for classroom situations.

For example, consider developing interactive, computer-based independent study instructional modules for the English Department in which students in campus classes can learn and practice using correct verb tenses, capitalization, and punctuation. These computer modules could be integrated into the English Department curriculum. Thus, independent study would be seen as contributing something important to the traditional instructional process.

By helping academic departments improve their traditional classroom programs, you build support for independent study. Thus, independent study can help academic departments do a better job.

The more successful strategic alliances you can develop, the more central independent study is to the academic mission of the institution.

In this example, it is the independent study professional who is changing first, not the institution. The independent study professional takes steps to avoid anomie and thus creates a positive force for change within the institution.

- Work with telecommunications specialists such as video-disc groups, educational television, and other providers of distance education to develop cooperative programming. This helps develop strategic, symbiotic alliances designed to serve clients more effectively.

2. Conduct action-oriented research related to independent study and publish the results. Colleges and universities pride themselves on their research accomplishments. Independent study professionals should be doing action-oriented research to open new frontiers of knowledge related to the independent study format. When we do this, we may be viewed as making a valuable contribution by our faculty colleagues. Therefore, to enhance our centrality to the university's mission, it is important that we write and publish the results of research in places considered legitimate by the academic community.

If you work for a traditional academic institution in which the body politic places high value on publications, *it is essential to research and publish compatibly with this organizational value.* This legitimates independent study professionals. Ignoring this important area of endeavor means rejecting the traditional reward system and diminishing the status of people who choose not to participate in it in the eyes of important stakeholders in the university.

Academic institutions usually establish clear expectations and norms in this area. To be viewed as legitimate in the academic community, independent study professionals should actively participate in research.

3. Develop strategic plans for increasing the completion rate for independent study courses. Across the nation the completion rate for independent study courses tends to be low. Many institutions report completion rates of 50 percent or lower. It is difficult for traditional academicians, who often sit on influential college and university committees, to support allocating more resources or providing more recognition for a department that cannot claim a higher course-completion rate than 50 percent when compared with completion rates for classroom courses that are usually significantly higher.

To enhance the viability of independent study within the institution, it is imperative to develop plans to address this issue.

Create committees that crosscut the disciplines found most often in the independent study format. Ask for advice. Let the institution know we are concerned about this issue. Develop and test strategies. Report results. Revise plans. Actively address this issue.

4. Publish a campus newspaper. It is not enough to accomplish important things for students and for the institution. It is equally important to *inform* the institution about these contributions *in a way compatible with the organization culture*. One of the most effective ways to do this is to publish a newspaper several times a year for distribution internally. Mail copies to all staff—not just faculty. This newspaper should be designed to accomplish the following:

- Tell of the successes of the entire independent study operation.
- Tell about the difference the independent study format makes in the lives of its students.
- Highlight the roles faculty in academic departments play in the development of independent study materials.
- Inform about the magnitude and variety of course offerings.
- Describe the role independent study plays in helping the parent organization achieve its mission.

This newspaper must represent the professionalism for which you want your office to be known. The articles should be designed to attract the reader's attention even if the reader has never heard of independent study. The quality of the writing must be of a journalistic style readers expect from good newspapers. Photographs must be taken by professionals. Editors must review the copy so that the English and journalism departments will reinforce and support your excellence in writing style and mechanics. Independent study units must allocate resources to achieve a professional publication.

5. Collect and publish testimonials from satisfied students. Nothing is as successful as publicizing testimonials from satisfied students. Emphasize how having access to the alternative of independent study has made a positive impact on their lives. Describe how this helps the parent institution achieve its mission.

Such a publication can be useful for both internal and external marketing. Mail copies to all faculty and staff at your institution, and send them to prospective independent study students. Consider sending copies to external decision makers such as members of the legislature and the state department of education.

Such a publication, circulated internally within the parent organization, will raise the level of visibility for independent study and address issues of centrality.

6. Hold an independent study symposium on your campus. Typically a symposium addresses a topic important to professionals in a field as well as students. Experts are invited to participate, debate, listen, and think through new ideas.

A published proceedings results from many symposia. Articles are contributed and refereed by professionals in the field before they are published. This ensures that the writers will get credit for their contributions during the tenure, promotion, and yearly evaluation process.

Academic symposia are an important part of the organizational culture in any institution of higher education. Such a symposium can serve several purposes. It can:

- Attract attention to independent study programs through both internal and external news releases.
- Provide a forum for debate and offer suggestions for addressing future changes.

- Reinforce within the academic community the fact that the independent study area of lifelong learning is a legitimate field of research and academic inquiry.
- Highlight the symbiotic relationship between independent study and the parent institution.
- Involve key stakeholders such as administrators and faculty in participating in discussions and suggesting new strategic alliances.

7. Hold an independent study recognition day. A recognition day is geared to the following two activities:

- Recognizing the role faculty in academic departments play in the independent study program. A recognition day provides an opportunity to thank them publicly and to have their pictures in local publications. It provides a visible forum for awarding certificates of merit for faculty contributions to this important and valued component of the institution's delivery system for educational programs.
- Highlighting the impact the independent study format has on student success. Involve successful independent study students in such a recognition day and award them certificates to highlight special accomplishments.

8. Encourage key independent study staff to plan their lifelong learning in relation to their career aspirations. We must develop our continuing education organizations so that they become learning organizations for our staffs as well as our students. The professional development of our staffs must be one of our highest priorities. In order to accomplish this, we must work with staff in designing individualized professional development plans. Such plans should address the needs of the organization as well as the individual. And such plans should be designed to reinforce the lifelong development of people as the primary means for helping the organization achieve its goals.

In addition, we must address the degree requirements for key leadership positions in independent study. In most institutions of higher education, the terminal degree in an appropriate discipline is considered necessary to achieve academic legitimacy within the traditional reward structure. In most cases this means the doctorate. If key independent study staff do not have this terminal degree, it will be difficult for them to be viewed as academically legitimate by those who do have it. Therefore, it is essential that we encourage our key staff to work toward the doctorate if they do not already possess it, and seek to hire new staff who already have the terminal degree for our key leadership positions in independent study.

Having staff in key independent study leadership positions with this academic legitimacy is essential to developing strategic alliances with university faculty and administrators. It contributes to empowerment, developing symbiotic relationships, and enhancing the image of the independent study staff as equal to teaching staff in educational qualifications.

9. Provide local, state, regional, and national leadership for independent study. Encourage independent study staff to hold office in local, state, regional, and national professional organizations. Encourage them to give speeches, workshops, and other types of presentations for a variety of groups. Assist with the development of appropriate materials that can be handed out at such meetings—materials designed to tell the story of how valuable independent study is in helping the parent organization achieve its mission. Arrange for radio and television appearances to tell the independent study story.

Develop mentoring relationships across institutional lines. Professional associations can help create networks among local, state, regional, and national leaders.

There are many ways to measure and evaluate leadership in this area. The important thing is that key independent study staff must move outside the formal boundaries of their institutions and

become actively involved with other institutions, professional and civic associations, and their communities.

10. Develop a sophisticated financial management system. Few people in institutions of higher education respect departments that do not manage their money with care and sophistication. It is important to develop excellence in daily financial management, and long-range financial modeling and forecasting.

For example, in the Department of Independent Study at the University of Nebraska–Lincoln, our director, Monty McMahon, has developed a computer model for financial forecasting. He projects his income and expenses for each budget area in his office for five years in advance. This enables him to change the variables affecting his model based on his most recent data. As a result of this sophisticated financial modeling, he is able to develop long-range strategies to keep our Department of Independent Study in a strong financial position. And this, in turn, helps ensure sophisticated long-range forecasting for the rest of our continuing education operation.

This helps us to emphasize centrality for independent study within our parent organization. People at all levels pay attention to departments that develop sophisticated strategies to ensure that they contribute to the excellent financial management of the parent organization. This also becomes an important source of empowerment within the organization. And taking the initiative to do this creates a self-fulfilling prophecy of empowerment, as active leadership always does.

Summary

Does independent study have a bright future within our colleges and universities? Absolutely. But only if independent study professionals develop action-oriented strategies to enhance this centrality. Only if we develop strategic alliances within the institution, apply action-oriented research efforts to the entire inde-

pendent study operation, and only if we promote change rather than resist it will this happen.

The future of independent study is bright. There will always be a need for print-based approaches to independent study through traditional correspondence courses; however, the market is changing, and we must change with it. Traditional, print-based correspondence courses will remain an important part of the market. In fact, the market will probably expand as new technologies create a need for and an interest in more nontraditional educational opportunities. This was the case with paperback books. Originally publishers thought that paperbacks would eliminate the need for hardbacks. Instead, paperbacks have filled an important marketing niche and actually helped to enlarge the niche for hardback books.

Independent study is poised on the frontier of the twenty-first century. The decisions we make today, the leadership we provide, the strategies we develop, the research we conduct will determine our destiny—our future. We *can* empower ourselves. We *can* direct this change. We *can* create our own new horizons. We *can* set this bold new agenda for the twenty-first century.

It was William Jennings Bryan who said, "Destiny is not a matter of chance. It's a matter of choice." We can make that choice. We can become our own heroes.

Chapter 13

International Aspects of Independent Study

Michael G. Moore

Throughout its history American independent study has been influenced by, and been a powerful influence on, developments in other countries. The origins of some of the most important issues that confront us today, especially the question of how best to organize and administer independent study, are to be found in events that occurred outside our borders and in challenges to our thinking that have infiltrated from abroad. On the other hand, what is happening abroad and the success of modern distance education around the world are directly attributable to ideas and practices of independent study practitioners in the United States. Furthermore, some of the issues emerging overseas, such as the extent of self-direction to be allowed the learner and the place of interactive telecommunications in instruction, are ones that some Americans have thought through more than their foreign counterparts. A revival of interest by Americans in such international organizations as the International Council for Distance Education makes it likely that Americans will make significant contributions in the future.

The Problem of Terminology and Conceptualization

The term "independent study," as used in the United States, describes two ideas. One is the concept of the learner being independent from the instructor in time and place, and the other is the relative autonomy of decision making concerning their learning that students obtain by their geographic independence. In a classic definition, Wedemeyer (1971) wrote

Independent study consists of various forms of teaching-learning in which teachers and learners carry out their essential tasks and responsibilities apart from one another, communicating in a variety of ways for the purpose of freeing internal learners from inappropriate class paces or patterns, of providing external learners with opportunities to continue learning in their own environments, and of developing in all learners the capacity to carry on self-directed learning. (p. 550)

Unfortunately the term "independent study" is not used outside the United States except in its second meaning; thus, it does *not* signify that "teachers and learners carry out their essential tasks and responsibilities apart from one another, communicating in a variety of ways."

Outside the United States such activity is defined as "distance education." This term is a translation of German "Fernunterricht," French "Tele-enseignement" and Spanish "Educacion a distancia." The concept "distance education" was used in the early history of American correspondence education; for example, Axford quotes a University of Wisconsin catalog of 1896 that says the "earnest student may do good work at a distance" (p. 56). The contemporary use of the term "distance education" can be traced to the German Otto Peters, who employed it at the 1969 conference of the International Council for Correspondence Education, where he attributed it to the British adult educator Brian Jackson (Peters, 1969). At least two important theoretical and practical consequences result from the use of different terms in America and elsewhere. First, the American emphasis

on learner autonomy, "freeing internal learners from inappropriate class paces or patterns" and "developing in all learners the capacity to carry on self-directed learning" receives little consideration in most other countries. The concept of andragogy is little known outside the United States and there is little appreciation of adult students' potential to control or participate in the conduct of their own education. "Inappropriate class paces" are, in fact, insisted on in many open universities, where students are enrolled in annual cohorts and are required to complete all stages of their studies in lockstep fashion. Expensive counselling arrangements ensure that everyone keeps in step, reflecting the faculties' highly paternalistic and frequently socialist persuasions. (In America, too, the autonomy of the learner often receives less consideration by course designers and instructors than the independent study philosophy implies.) Making concessions to the self-direction and self-motivation of the individual learner is, however, a significant feature of American independent study that the rest of the world has yet to come to terms with in program design and delivery.

American distance educators who are not members of the NUCEA Independent Study Division are reluctant to accept the term "independent study." Because this term is used almost exclusively by members of what was previously known as the Correspondence Study Division to describe programs using print more than other media, the term is generally associated with correspondence study. Although Wedemeyer's definition accommodates all communication media, educators who are primarily involved with electronic media have not embraced it. They have been inclined to use the international term "distance education," causing further confusion since foreigners who research American distance education perceive that only electronic media are used. This is unfortunate because neither the term "distance education" nor independent study in theory represents any one communication medium. However, the term "distance education," as used internationally, communicates the idea of multimedia delivery more successfully than independent study does, while independent study expresses the active role of the learner better than does distance education.

International Exchanges, Historically

Most scholars accept that correspondence teaching was a European invention and credit Charles Toussaint and Gustav Langenscheidt with starting the first organized instruction in 1856. There is, as yet, no evidence of communication between those Europeans and such American pioneers as Anna Ticknor or Thomas J. Foster. However, it is certain that a great deal of interaction existed in the nineteenth century between American and British enthusiasts of the general idea of what we might now call nontraditional higher education. When the idea of a degree outside the conventional university was rejected in England in the 1880s, Richard Moulton, one of its strongest advocates, actually migrated to the United States to help build William Rainey Harper's new university in Chicago. By 1930, according to Bittner and Mallory (1933), correspondence teaching was offered by 39 American universities, although there was little interest in using the method for university teaching in other countries. Among the exceptions was the University of Queensland in Australia, where correspondence teaching began in 1911; in Britain the University of London would examine persons who studied with private correspondence colleges. Even by 1969 the best Western European practice that Peters could report at the quadrennial meeting of the International Council for Correspondence Education was that in Sweden university students in nine subjects could study part of their course by correspondence, and that there were experiments or investigations occurring in the Netherlands, Federal Republic of Germany, and Norway. In Eastern Europe there was more interest, with 25 to 50% of university students in the German Democratic Republic studying by correspondence (Peters, 1969).

The late 1960s and early 1970s brought critical change in independent study, both internationally and in America. It was a time of new conceptualizing and of experimenting with new media. The experiments included, in Peters' words, "projects of the University of Nottingham and the National Extension College in cooperation with the Television Broadcasting Corporations in En-

gland" that led to an idea for a "new and unconventional academic institution" called the British Open University (1969, p. 101).

America's AIM Project and Britain's Open University

In his review of research in correspondence study in the United States at the 1969 ICCE conference, Ossian MacKenzie of Pennsylvania State University referred to "the work which has been conducted at the University of Wisconsin in articulation of instructional media" (p. 84). This was an experiment named the Articulated Instructional Media Project (AIM), funded by the Carnegie Corporation from 1964 to 1968, to join (that is, articulate) various communication media for teaching off-campus students. The media included correspondence study guides and correspondence tutoring, programs by radio and television, recorded audiotapes, telephone conferences, and local library resources. Counseling and local study groups, as well as the use of laboratories during summer periods, were integral elements of the instructional system (Wedemeyer and Najem, 1969).

AIM represented a historic breakthrough in the use of correspondence instruction and other media because it operationalized the idea of dividing the functions of the teacher and used numerous media to deliver instruction that was assembled by a team of specialists. In particular, the learner could benefit from the presentation strengths of the broadcast media as well as the interaction possible by correspondence and telephone, and human facilitators occupied a place of maximum effectiveness in the delivery system.

In 1965 the director of AIM, Charles Wedemeyer, gave a lecture about AIM in Wiesbaden, Germany, after which he was approached by Frank Jessup from the University of Oxford and told about the idea then circulating in Britain for a "University of the Air." Jessup invited Wedemeyer to Oxford, where he met in St. Anthony's College with Professor Harold Wiltshire and Dr. Fred

Bayliss of the University of Nottingham. Wedemeyer told them about AIM and they told him about the work they were doing in teaching economics at university level in a program of integrated correspondence, television, readings, and face-to-face tutorials—work based, so they said, on American exemplars, and clearly similar to AIM (Wiltshire & Bayliss, 1966). (This experiment would be cited a few years later by Peters in the ICCE presentation mentioned above.) In London Wedemeyer met Michael Young, founder of the International Extension College, and in Nottingham he met Wiltshire's colleague Walter James, who with Bayliss wrote the Nottingham program. To all these and others, including the future British minister of education, Christopher Chataway, Wedemeyer explained the philosophy and methodology of what was then the most advanced form of independent study in the United States. AIM, he explained, was based on "the philosophy of correspondence study [which] operates on the individual pursuit of learning . . . to provide integrated sequential learning at a rate and in a place that is most appropriate for adults" (1982, p. 21). Above all, he drew attention to what he considered fatal flaws in the AIM structure, and by so doing made what may be regarded as one of America's biggest contributions to distance education. "AIM," wrote Wedemeyer, "was an experimental prototype with three fatal flaws: it had no control over its faculty, and hence its curriculum; it lacked control over its funds; and it had no control over academic rewards (credits, degrees) for its students. The implications were clear: a large-scale, nonexperimental institution of the AIM type would have to start with complete autonomy and control" (1982, p. 23).

In September 1967 the Planning Committee of the Open University began its work, with Wiltshire as a member. In 1968 Walter Perry was nominated as vice-chancellor, Anastasios Christodoulou was named university secretary, and Walter James was appointed one of six directors of studies. In November, Christodoulou visited Wisconsin to study AIM's methods, and two months later Wedemeyer met with Perry and his officials in London. In May 1969 Walter James visited Madison and in September Wedemeyer moved to the site of the Open University's new campus at Milton Keynes in England to spend several months assisting the British in further development of their plans for the new institution.

Even before then, Walter James had written to Wedemeyer, "You bear some responsibility for the emergence of the Open University in this country. It was your talk on Articulated Instructional Media (AIM) that stimulated us to produce at Nottingham the first university course in this country in which television broadcasts and correspondence instruction were integrated, and it was this experience which produced interest in the University of the Air idea. Harold Wiltshire as you no doubt know was a member of both the government committees, the one concerned with examining the idea and the other with planning specifically for the introduction of the Open University; so there is a fair amount of you represented in the outcome of all these events" (cited in Wedemeyer, 1982, p. 27).

According to Wedemeyer, "Almost the entire educational geography of an open educational system was identified in the AIM experiment" (1982, p. 23). In particular, with AIM's three fatal flaws in mind, British policymakers resisted the appeal of the higher education establishment to make distance education an add-on to conventional university education, and instead, in 1969 established the Open University as a fully autonomous, degree-granting institution.

Spread of the Distance Education Idea

As the University of Nottingham learned the potential of and developed expertise in the distance education approach, it passed on its experience within its own spheres of influence. Outstanding among these was the University College, Nairobi, in Kenya. A "big brother" relationship existed between many institutions of higher education in the British colonies and universities in the mother country. Under Harold Wiltshire's influence the new ideas about distance education were introduced into the Kenya environment. The "ABC of Economics" was an African version of Nottingham's television/correspondence project. The television component was soon abandoned in favor of the more accessible medium of radio. In search of foreign expertise in teaching by correspondence and radio, Nairobi and Nottingham officials ap-

proached America's Agency for International Development for assistance. In 1966 Arthur Krival assembled a Wisconsin team, several of whom had acquired experience in AIM, which went to Nairobi to establish the Correspondence Course Unit. One of the major charges to the Unit was to develop and deliver a program for inservice training of Kenya's school teachers. The unit is now part of the Division of Adult and Distance Education, making a major contribution to Kenya's national development as an independent state, especially through its inservice teacher education program. Krival and the Wisconsin team eventually handed over the project to Kenyan educators, led for most of the subsequent period by a graduate of Syracuse University, Peter Kinyanjui. Other leaders of distance education in newly independent African states sought training and inspiration from Wedemeyer in Wisconsin. They included Martin Kaunda of Zambia, Khatun Rhantulla of Tanzania, Frank Nabwiso of Uganda, and Antoine Kabwasa of the Ivory Coast.

In Britain, too, the seeds planted by Wedemeyer and others took root, and in the form of the Open University became fruitful beyond the greatest hopes of its inventors. More than any other institution, the Open University proved the viability of distance education. In the 20 years after its formation it was emulated in many other countries that set up similar national, publicly funded, autonomous institutions of their own.

What it did for Britain and subsequently for the world was to demonstrate many principles and practices of American independent study which have been taken for granted in this country but were revolutionary abroad in the freedoms they permitted the learner. These included not only the use of integrated media to provide high-quality instruction in places of the learner's choosing but also the practice of constructing a degree in modules, with the student accumulating "credits" toward a degree. This made it possible for the student to design a personal study package from the various courses offered. It also meant students could postpone study for a period or actually fail a course yet complete the degree. Both of these principles were eminently sensible for adult, part-time learners. These features were previously foreign to the

brutally competitive and selective higher education systems of Europe. Another American practice adopted and spread by the Open University was that of "formative evaluation," figuring a substantial part of the student's course grade on the basis of work done in the life of the course instead of solely on performance in a final examination. By changing traditional teaching techniques, the Open University proved to the world that higher education lies within the ability of ordinary adults working mainly under their own self-direction, and in so doing it internationalized the philosophy and practice of American independent study.

Contemporary Distance Education Organizations

In attempting to classify the thousands of contemporary distance education organizations worldwide, Neil (1981) distinguished between the autonomous institution that he called the "whole system control model," such as the British Open University, and institutions that are "embedded into communities of educational agencies" (p. 130), which would include American university independent study departments. Autonomous institutions have full authority in four areas of management in which the embedded system has to share authority with a parent or other superior body. These areas are finance, examinations and accreditation, curriculum and course design, and instructional and counselling services. There are national autonomous institutions in about 20 countries. The following are some, with the dates of their founding:

- Universidad Nacional de Educación a Distancia, Spain (1972)
- Everyman's University, Israel (1974)
- FernUniversität, West Germany (1974)
- Allama Iqbal Open University, Pakistan (1974)
- Athabasca University, Canada (1975)
- Universidad Estatal a Distancia, Costa Rica (1977)
- Universidad Nacional Abierta, Venezuela (1977)
- Sukhothai Thammathirat Open University (1978)

Open Universiteit, The Netherlands (1981)
Sri Lanka Institute of Distance Education (1981)
Kyongi Open University, Korea (1982)
University of the Air, Japan (1983)
Universitas Terbuka, Indonesia (1984)
Indira Gandhi National Open University, India (1985)
National Open University Taiwan (1987)
Al Quds Open University Jordan (1987)
Universidade Aberta, Portugal (1988)

The U.S.S.R. reportedly has 14 autonomous distance teaching universities (Ilyin, 1983).

Like the British Open University, most foreign distance education institutions are autonomous, and most have a national mandate. They receive most of their funding from central governments and are required to provide distance education throughout the nation. (Athabasca University in Canada is mandated to serve the province of Alberta but attracts some students from outside that province.) The United States is one of a dwindling group of countries that has no national, autonomous distance education university. In this country several thousand different institutions design and deliver distance education to a student market that is extremely fragmented, geographically and sectorially. Some serious problems arise from a third form of fragmentation, which is the dispersed control of educational communications media.

In foreign autonomous universities, the full range of communications media are usually under one central direction, and teaching programs can be designed to employ them most effectively. In the course that is finally produced, correspondence is inextricably linked to audio and video recordings and broadcasts, prepared texts, face-to-face seminars and summer schools, teleconferencing, and other resources. The work of independent study specialists is highly integrated with the specialists in other media, both at the design stage and during the presentation of the program.

It is true that such linkages sometimes are made in American independent study, but usually only specialists in one or two media are so linked, and such linkage is more the result of individual voluntary effort than systematic. Furthermore, the total of communication and human resources employed in distance education in the United States must exceed those of any other country, but because other countries concentrate their resources in single organizations and the resources employed on any project are far greater than in America, the programs are usually superior.

Most foreign distance education institutions are very large, though some are no bigger than the larger American independent study departments. In Thailand the Sukhothai Thammathirat Open University has some 200,000 students with a target of admitting around 500,000. Germany's FernUniversität has a student body of around 30,000. There are 83,000 students in Portugal's Universidade Aberta; Canada's Athabasca University is one of the smallest autonomous institutions with just over 16,000 students. The British Open University has an annual enrollment of about 130,000 students. In these and other open universities, most students are adult, part-time learners. Most are studying for either a baccalaureate degree or in courses of continuing education in such professions as teaching, engineering, and business. The idea that professional continuing education (or even professional preliminary education) is a legitimate university function is another American concept only recently taken up in Britain and other countries.

Being autonomous institutions means, as Wedemeyer had urged, that the open universities are able to award their own degrees and are spared the restraints imposed on "embedded" independent study departments. The British and many other open universities are not required to recruit only students with previous educational attainment; admission is open to all, regardless of academic qualifications. Not only is there no restriction on how many courses students can take through independent study, but in most institutions the degree can only be obtained in this way.

Most open universities have emulated the American modular course structure. The British Open University degree is awarded on successful completion of six full courses or the equivalent, each course taking about one year's part-time study. There are a total of 42 full (about 400 hour) courses, and 94 half (about 200 hour) courses.

Given the genesis of modern open universities in the American independent study method, it is noteworthy that correspondence instruction remains at the heart of most foreign teaching systems. In Britain more than 3 million correspondence course packages are mailed each year, and nearly a million student assignments are submitted and marked.

In many ways the open universities have progressed far beyond their American progenitors. The differences lie in the degree of central planning and integration of media, in the scale of the delivery systems, in the numbers of staff, in the faculty-student ratios, and in the greater sophistication of personnel practices. The British Open University employs 800 full-time academic faculty at the central offices to design and produce courses, and 2,000 others assist and maintain the administration. Not all open universities invest so heavily in their own full-time course writers. Although the Open Universiteit of the Netherlands, for example, is an autonomous institution, academics of conventional higher education institutions write about half its courses. This gives a flexibility of response to changing curricular needs which the British have lost. In the Dutch, British, and most other foreign institutions, the status of instructor and of student counselor in distance education is quite high, and this promotes student progress and achievement. In the British Open University, 1,000 staff members in regional offices provide student support services and administer the instruction of 5,000 part-time correspondence teachers. No correspondence tutor has more than about 50 students to monitor and instruct, and many have less. The position is paid better than for comparable work in America, and there is great demand for such employment. Recruitment and selection is methodical; pre- and in-service training is given; instructors are systematically monitored, supervised, and, if necessary, disci-

plined. As a result of such personnel practices, students enjoy high-quality instruction and counseling. Each student is personally known to counselors and instructors, and face-to-face meetings between students and instructors at local study centers are designed into the course programs and budgets. In a survey of open universities, Rumble and Harry (1982) found that *all* had some form of local study center. For example, the Universidad Nacional Abierta in Venezuela, which has 24,000 students, provides 21 regional centers where full-time counselors are available for consultation and tutorials and study groups are organized.

Embedded Institutions and Collaborative Agreements

It is not only in the United States that higher independent study has evolved within parent institutions rather than in autonomous institutions. In China about 300,000 students are in correspondence programs offered by 311 of the country's 800 colleges and universities; a similar number are in courses provided through the Radio and Television University, and another 300,000 are in local TV universities (Jianshu, 1987; Yu, 1986). Embedded distance education is seen in the Australian external degree programs, in which seven universities engage in distance education with a total of about 15,000 students, or around 10% of total enrollments. In addition there are 29,000 students enrolled in distance education programs of the Colleges of Advanced Education and 350,000 in the Technical and Further Education sector (White, 1987).

In many countries, collaborative arrangements involve two or more conventional institutions of higher education working together to design and deliver distance education. Important examples are Federation Interuniversitaire de L'Enseignement a Distance in France, which coordinates the activities of the distance education centers of 22 universities, and Italy's Consorzio Per L'Universita a Distanza, which designs learning materials and student support services for students who register with universities

that are members of the consortium. In Ontario, Canada, "Contact North" serves 27 communities through coordinating centers in member colleges and universities.

Theory of Distance Education

An overlooked contribution of American independent study to the evolution of distance education is the work of its scholars on conceptualization and theory. Wedemeyer's landmark definition has already been referred to. Following it, and building on it, was my own "two-dimensional theory" first presented in 1972 at the International Council for Correspondence Education. This has been described as one of the world's six most significant theories by the Australian writer Keegan (1980), whose book *The Foundations of Distance Education* (1986) attempted to respond to my call for research into what I called the "macrofactors" of distance education, that is, the building of a theoretical framework to explain and support the field. Another prominent writer, the Swedish scholar Holmberg, has also built on the theory in many articles and papers, most accessibly in his book *Growth and Structure of Distance Education* (1986). In Britain, Greville Rumble has called the theory "the most fruitful use of the term 'distance'" and used it to orient readers of his book *The Planning and Management of Distance Education* (1986).

The significance for this discussion of the two-dimensional theory is that it derived from the literature of American independent study. As a result, the theory focuses not only on distance, classified by the elements of structure and dialogue, but also on the "second dimension" of independent study, learner autonomy. This theory, therefore, has brought to the world's attention what Americans in independent study consider important—the learner's autonomy as well as the distant instructor. It is discussed in courses about distance education in India, Australia, Germany, and Britain and is featured in the writing of contemporary international scholars including the Canadians Garrison and Shale (1989), Australia's Keegan (1989), and Poland's Potulicka (1988).

International Council for Distance Education

An international organization of correspondence educators, the International Council for Correspondence Education (ICCE), was formed in 1938. The idea for ICCE is generally attributed to a Canadian, J. W. Gibson. The first ICCE conference met in Victoria, Canada, in August 1938, with 88 delegates, mostly Americans and Canadians. An American, Rex Haight, was elected ICCE's first president. The second conference was held in Lincoln, Nebraska, in October 1948 under the presidency of Knute O. Broady. After the third conference in Christchurch, New Zealand, in April 1950, ICCE returned to the United States for its 1953 conference at Pennsylvania State University, held under the presidency of W. R. Young, Penn State's supervisor of correspondence instruction. Viron Moore, assistant dean of the Extension Division of the Oregon State System of Higher Education, was ICCE president for the sixth conference, held in Gearhart, Oregon, in 1961. Until



Three International Council on Correspondence Education (ICCE) presidents and two vice presidents: left to right, Ripley Sims, Renee Erdos, Michael Moore, Borje Holmberg, and Charles Wedemeyer.

the seventh conference, held in Stockholm, Sweden, in 1965, ICCE membership and conference participation was overwhelmingly American. In 1965 the council for the first time became truly international, with representatives from 27 countries. At the eighth conference in 1969, at UNESCO House in Paris, there were representatives from 34 countries.

Following the Paris conference, Charles Wedemeyer was elected president, and the ICCE returned to America for its ninth conference in Warrenton, Virginia, in 1972. Under Wedemeyer's presidency, ICCE was recognized as an international nongovernmental organization by UNESCO, a newsletter was established, the first training institute was offered, and a committee was set up to promote international research.

At the 1972 conference the term "distance education" and the concept of distance as a dimension of teaching and learning was introduced. In recognition of the arrival of electronic media, and mainly as a result of pressure from European members, the ICCE changed its name in 1982 to the International Council for Distance Education (ICDE).

Conferences were held in England in 1975, India in 1978, Canada in 1982, Australia in 1985, and Norway in 1988. The 1990 conference was held in Caracas, Venezuela, and the 1992 conference will be held in Bangkok, Thailand. A Permanent Secretariat was established in 1988 with offices in Oslo, Norway. By 1990 there were about 500 members in 50 different countries.

As distance education has prospered around the world, America has lost the dominant position it held in the early years of ICCE's history. Indeed, in recent years participation and leadership in ICDE has been assumed by many countries with substantially less significant distance education experience than the United States. Regional associations of distance education have been established under ICDE's auspices in Europe, Asia, Latin America, and Africa, with national associations in many coun-

tries. The formation of a national association to be known as the American Council for Distance Education was under discussion in spring 1991.

What of the Future?

Through such organizations as the International Council for Distance Education and an American Council for Distance Education, the future will offer many new opportunities for American universities to both contribute to and benefit from a policy of deliberate involvement in international distance education.

We have recently entered an age when cheap and effective international communication by such media as audio-conference, satellite video-conference, computer conference, audio-graphic and facsimile makes interpersonal and interinstitutional communication for the purpose of planning and delivering educational programs economically viable. The course team need no longer depend on participants' ability to travel to a common space; and there is no justification for depriving learners of the better programs provided by design and delivery on an international scale. Americans must find opportunities to join with collaborators in other lands to design and deliver the next generation of distance education courses. Such opportunities will be found by those individual American educators who involve themselves in the international distance education community.

By attending ICDE conferences, by writing in the ICDE Bulletin and in other international journals, American distance educators will be able to meet nationals of other countries to develop professional networks, and this in turn will promote trust and cooperation. Like other countries, which give political value to their involvement in international distance education, the United States must develop a foreign policy regarding distance education and an awareness of its international policy implications. American distance education should not enter the Information Age with its current quasi-isolationist global perspective. Of course, a

hurried, neocolonial policy of patronage and influence buying would be even more disastrous. Strategic thinking on this issue is urgently needed.

American independent study has great potential as a world leader in research, study, and teaching of distance education. Some of the main concepts and theories concerning distance education have emerged from American scholars. Our systems of educational research compare favorably with the best in any country. In particular, our graduate schools of education represent an unparalleled resource of scholars and one of the world's best systems for training young people. As politicians, administrators, academics, and students come to recognize the opportunities in late twentieth-century distance education, America may once again achieve the position of world leadership it held until the 1970s through the training of a new generation of educators and through the improvements in organization and practice that may follow our research.

American independent study has made a significant contribution to the international evolution of distance education. Much more could be said about the numerous bilateral interactions between American and foreign institutions, notably between American and Latin American as well as Asian and European universities. In the past, a few educators both at home and abroad have found that foreign experience and thinking helped to clarify their problems and sometimes to find ways of dealing with them. In the future such bilateral as well as multilateral international exchanges of ideas and experiences and their reciprocal impact will likely increase. This increased velocity in the exchange of ideas is an inevitable result of the ever-increasing sophistication and lower costs of communications media and international travel. These communications media are likely to contribute even more than in the past to the redundancy of national boundaries. As the world outside the United States comes to reappraise the relative value of choices made by individuals as compared with social decisions in learning, those of us who want to promote independent study as an educational method for the future are advised to understand it, and to treat it, in its global as well as its national context.

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Chapter 14

Looking to the Future

*Barbara L. Watkins and
Stephen J. Wright*

The chapters in *The Foundations of American Distance Education: A Century of Collegiate Correspondence Study* emphasize the contributions of independent study practitioners since 1892 to higher education in the United States. Continuity and flexibility have been the hallmarks of this century. Although some issues confronting independent study programs today vary remarkably little from those that the universities of Chicago and Wisconsin faced at the turn of the century, the problems demanding attention in the decades immediately ahead parallel the challenges confronting other university departments.

One of the most important issues involves independent study practitioners' perceptions of their professional niche and role. In the mid-1960s Charles Wedemeyer and Gayle Childs argued compellingly that a broader term than "correspondence study" was needed to describe the circumstances of that period and the influence of new technologies on the profession. Representatives of NUEA's Correspondence Study Division selected the term "independent study."

Now the realities of the 1990s suggest that another change of name, reflecting a further evolution of identity, is appropriate. The

term "distance education" implies an application of technology to education, unlike "correspondence study" or even "independent study," which are—in the minds of many—irrevocably tied to print-based instruction. The future of independent study is clearly entwined with the distance education movement.

Independent study practitioners must firmly establish a place in distance education in order to form new partnerships and alliances, to redefine their areas of professional interest, and to broaden their activities and the emphasis they place on the use of electronic media (Markowitz, Almeda, Logan, Loewenthal, & Young, 1990). To move assertively forward, however, independent study practitioners must know the history of their profession.

Those independent study professionals who don't know who they are or where they have come from have left the history of their profession "parked in the street, doors unlocked, keys in the ignition, engine running, back seat full of valuable packages . . . It cannot be any surprise then, if [others] are now driving off with the goods" (P. Limerick, cited in Atlas, 1991, p. 22). If they don't know, for example, their predecessors' role in founding and developing the National University Extension Association (now NUCEA), or in pioneering ventures in supervised correspondence study that helped create the junior college movement, or in integrating mediated instruction in University of Wisconsin correspondence courses that provided a model for the British Open University, how can they tell others about these accomplishments or use them to help map the future?

Another primary task for the future is internal marketing, that is, informing faculty and administrators about independent study's contributions to parent universities and to higher education in general. Independent study professionals must be persistent in representing the invisible, adult, off-campus learners in their deliberations with mainstream, campus-based administrators and faculty. Those in the independent study movement must, more than ever, be prepared to serve as dedicated advocates for nontraditional students who are able to access higher education only through distance education mechanisms.

Independent study practitioners must work closely with faculty to integrate technology in courses offered both on- and off-campus, to provide instructional materials for campus use, and to collaborate in research ventures. They must also inform state-wide constituencies about independent study courses that may meet their needs and about new technologies that help serve students better.

Demonstrating their contributions to parent universities will be of prime importance in the years ahead. Independent Study units must hire new staff with credentials that include doctorates in liberal arts, business, or education. To move from the periphery of the university to a more central position requires the academic credibility that these degrees provide.

Emphasizing academic credibility and quality will also help improve independent study's funding base and likely broaden its programming domain. Legislators and administrators alike react favorably to well-prepared, energetic, and visionary programming and to efficient management. Improving academic credibility will encourage faculty to participate more actively in independent study's professional associations and in collaborative research.

As the number of nontraditional students grows and as independent study becomes more central to American universities, problems of awarding and transferring credit for independent study courses may be alleviated, if not resolved. This issue of credit, which impacts image, enrollment, and funding, has been a sticking point for much of the past century. The active involvement of independent study departments in the distance education movement is a key to resolving this problem since many universities now make no distinctions between credit awarded for campus-based and television courses.

Restrictions on granting financial aid to independent study students are also wrapped up in the centrality and identity issues. Independent study professionals must work with university administrators to convince state and federal legislators to make financial aid guidelines more flexible, thus supporting part-time distance education students.

Closer relationships with parent universities will present new challenges for independent study practitioners, as well as new opportunities. One likely result is a reassessment of models of professional participation. These new models may require, for example, technological specialization, more marketing sophistication, or advanced education in the uses of statistics for program evaluation.

As independent study units seek more central positions on their campuses, administrators of these units must also continue to create innovative programming models to attract new constituencies. The University of Wisconsin's custom-made courses and Pennsylvania State University's automatic sprinkler program are examples of programs that serve businesses, industries, and professional associations well.

Two important issues in independent study's future that will affect all of higher education are the increasing options technology provides both for instruction and student services and the increasing need for educational options for adults and part-time students (Markowitz et al., 1990). Although wider use of technologies on campus and through distance education may blur distinctions between on- and off-campus credit, this extension of instruction by new technologies will compel the campus community to consider issues of faculty accessibility, local control of course content, and timely revision of materials. Independent study staffs have substantial experience in dealing with these matters that will help university personnel review and revise policies and instructional practices.

In the years ahead, independent study's place in higher education will likely become even more important than in the recent past. Huey B. Long, professor of education at the University of Oklahoma, commented that "more and more corporations are headed in the direction of the 'empowered learner,' that is, the learner who knows how to learn and is psychologically set to aggressively assume increasing responsibility for learning, especially as it relates to career advancement" (personal communication, September 9, 1991). IBM, for example, envisions educating

its employees by the year 2000 at the individuals' worksites. Long noted that when adult learners assume responsibility for work-related learning, they will probably also use these skills of access in leisure-time educational activities. When incorporating these new learning methodologies, independent study professionals will need to focus more carefully on the psychological bases of learning materials to improve learner achievement, retention, and satisfaction.

Creating new options for nontraditional students will be a pressing concern in the coming years. As education becomes more expensive and technologies more sophisticated, opportunities for higher education will be increasingly removed from those individuals who need access to learning and information the most. The educational inequalities of our time offer challenges far more formidable than extending educational opportunities to isolated rural populations or newly arrived immigrants at the turn of the century. Class and economic barriers will be as hard to crack as any obstacle in the past, but the same qualities of persistence, resilience, and ingenuity that have brought independent study programs through their first century will carry them into the next. The successes of the past provide building blocks for the future. In reviewing the first century of collegiate correspondence study, it is clear that extending education to the people—all the people—has been one of the wisest commitments American universities have ever made.

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Colophon

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The text is Palatino 11 pt. on 13 leading. The headings are Palatino, Franklin Gothic and Helvetica Light.

The University of Kansas Division of Continuing Education provided text and line art on disk to Kendall/Hunt Publishing Company for imaging directly to film.

Halftones were produced and stripped in by Kendall/Hunt from photographs provided by the University of Kansas.

The Foundations of American Distance Education was printed by Kendall/Hunt Publishing Company on 60# white offset paper stock with 12 point cover stock.

The Foundations of American Distance Education

A Century of Collegiate Correspondence Study

Edited by Barbara L. Watkins and Stephen J. Wright

The Foundations of American Distance Education will make an important contribution to the theory and practice of distance education, adult/continuing education, and to higher education. In many ways the collegiate independent study movement has been the radical arm of universities. It has suggested a fundamentally different instructional approach for diverse audiences.

Jerold W. Apps, Professor
Adult/Continuing Education
The University of Wisconsin-Madison

This is an inquiry into the origins of distance education and an exploration of the emerging issues that will impact distance education in the next century. As we prepare for the twenty-first century, it is imperative that we understand and put into perspective our past. This book does this as no other recent work. From this unique perspective on our past, emerging issues for the next century—technology, international distance education, research, and the development of the profession—are explored.

Connie L. Dillon
Assistant Professor of Education
and Kellogg Research Associate
The University of Oklahoma

This anthology should appeal to anyone with even the slightest interest in distance education. It provides a systematic addition to the history of distance education by describing important events in the past century and contemporary activities, as well as the vicissitudes of university-based distance education. With the new emphasis on the "empowered learner," independent study will become even more important in the future.

Huey B. Long, Professor of Education
The University of Oklahoma

The articles in this volume portray the diversity and richness of the field of independent study. They survey correspondence study in college credit, noncredit, and high school programs and address significant issues. The variety of presentations assures that novices and experts alike will find material of value.

Rae W. Rohfeld, Associate Professor
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KENDALL/HUNT PUBLISHING COMPANY
Dubuque, Iowa

ISBN 0-8403-7101-2