

**Knowledge Media Institute
The Open University**

20th anniversary event

***The Open University and Knowledge Media:
Pioneering Progress and Institutionalising Innovation***

Sir John Daniel, O.C.
Vice-Chancellor, 1990-2001

Vice-Chancellor, Colleagues, Ladies and Gentlemen:

I am delighted to be here with you to celebrate the 20th anniversary of the Knowledge Media Institute. The KMI was created during my tenure as Vice-Chancellor and of all the OU's innovations in the 1990s this is the one of which I am most proud. Holding this celebration as Peter Horrocks takes office as the OU's sixth Vice-Chancellor gives it special significance.

I wonder if I am the oldest inhabitant of the OU here today? I first worked at the OU in 1972, in its second year of operation. I was then an assistant professor of Metallurgical Engineering at the Université de Montréal and had enrolled in a part-time Masters programme in Educational Technology at the nearby Sir George Williams University thinking that learning more about Education might make me a better teacher.

I later realised that studying Education was an eccentric activity for a young engineering academic but I found the courses fascinating and the required 3-month internship changed my life. In 1971, when I was contemplating where to do it, the press was full of stories about an amazing innovation, by the Brits of all people, called the Open University.

This was clearly where the cutting edge of educational technology was, so I wrote and asked to do my internship at the OU. Professor David Hawkrige, the founding director of the Institute of Educational Technology, kindly invited me to come as a visiting lecturer for three months. I would not be paid but I would be given interesting work.

Those three months in 1972 were my revelation on the road to Milton Keynes. Everything about the OU impressed me: the scale – 40,000 hugely enthusiastic students after only one year; the dedication of all members of staff from the faculties through the warehouses to the regional centres; the comprehensiveness of the teaching-learning system; and the quality and interest of all the teaching materials – texts, broadcasts, home experiment kits and assignments.

I felt that I had seen the future of higher education and returned to Montreal 'no longer at ease in the old dispensation'. Fortunately, Quebec's Télé-université opened that same year so and I moved to Quebec City and re-oriented my career to distance education.

Eighteen years later the OU appointed me as VC and I moved here from Ontario.

I confess that by then I had not completed the Masters programme in Educational Technology that I'd started in 1970. I dropped out before doing the thesis. However, I'd continued to study part-time during the intervening years and completed a diploma in Theology – at a distance of course – soon after I arrived at the OU as VC.

When I then proposed to embark on a part-time Law degree my long-suffering wife rebelled and told me that if I must continue as a student I should complete the Ed Tech Masters degree. I thought this was an excellent idea and duly applied for re-admission to what had now become Concordia University. Showing great flexibility in waiving the rule forbidding re-admission after a 20-year absence, they let me back in to do the thesis.

In 1995, the year of KMI's creation, the OU kindly gave me a month's study leave. I spent it in a friend's basement in Montreal writing the thesis, which became my book *Mega-Universities and Knowledge Media: Technology Strategies for Higher Education*. A year later I took a weekend out from officiating at the OU's many degree ceremonies to go to Montreal and attend the Concordia convocation as an ordinary graduating student.

Taking 25 years to complete this degree does demonstrate my commitment to lifelong learning even though I am a slow learner. The experience did enable me to give reassuring rejoinders at our own OU degree ceremonies to the many graduates who said that their OU degrees had taken them a long time.

As possibly the oldest inhabitant here today I shall take a historical perspective. This being Peter's second week in office let me begin with the VCs. I had the privilege of a long conversation with Peter just days after the announcement of his appointment, so I know all six VCs. They are a diverse group. Having attracted me from Canada, Brenda Gourley from South Africa and Martin Bean from Australia via the USA it was certainly time to give the UK a chance again. And as a former head the BBC World Service, Peter Horrocks blends the national and the international perfectly.

Although the OU is the UK's largest university and will soon be 50 years old, all the VCs have had to fight for its place in the political sun.

Walter Perry took the blueprint from the Planning Committee and turned the OU into a real institution. Fortunately, the Committee had already dumped Harold Wilson's odd idea of having the OU organised as a consortium of Oxbridge colleges, and the OU now had its own Royal Charter, but Walter still had to create a large distance teaching system with very little to go on. It is remarkable how his design has stood the test of time!

The civil servants were terrified by the project and urged him to do a pilot test with 300 students. However, knowing that the strength of the OU would lie in economies of scale and big investments in teaching materials, Walter admitted a first cohort of 25,000.

Between the admission of these 25,000 applicants and the start of their studies the government changed in June 1970. I don't think that creating the OU was ever a formal Labour Party policy, but Prime Minister Wilson's passionate support had seen it through to the issuance of a Royal Charter in 1969. A Tory government with Margaret Thatcher as Education Secretary was a worrying prospect, but Perry secured her support, even if her motivation had more to do with finding a lower-cost way of expanding higher education than giving adult students a second chance.

Once tens of thousands of fanatically committed students began their studies the OU was politically unstoppable, but that didn't make the future plain sailing. John Horlock faced a period of cuts to higher education funding during his time as VC in the 1980s. In those days the OU received its state funds directly from the Department of Education and Science. This was a necessary protection in the early days, when being funded by the University Grants Committee might have resulted in the OU's strangulation by the old guard. However, the OU was now the UK's largest university and made the civil servants very nervous. They always erred on the side of caution when the OU asked to expand.

But the most alienating issue of John Horlock's time was the accusation of Marxist bias in its course materials levelled at the OU by Secretary of State Keith Joseph after a selective reading of the Social Science Foundation Course. He set up a Visiting Committee, which very sensibly did not attempt to vet all OU courses but checked that the OU had processes for avoiding bias of any kind.

As a result, when I arrived as VC in 1990 I found an institution that was very leery of dealings with government. In response to a request to expand its student numbers the government had just initiated a review of the OU. Most of the staff wanted nothing to do with this process. But it was clear to me, having lived outside the UK for 25 years, that to most foreign observers the OU was the jewel in the UK's higher education crown. I persuaded colleagues that we had nothing to hide, that any serious review of the OU would deliver a good result, and that we should put all our cards on the table.

We later discovered that the real purpose of the government review was to help it decide how to position the OU in the major reform of higher education that it was planning. We quickly understood that remaining in a direct relationship to government would not be an option, so we bent our efforts to positioning the OU well in the new system. On the one hand this brought all the former polytechnics and old universities into one policy framework, but on the other it federalised UK higher education.

The OU was extremely fortunate that Professor David Murray, a political scientist specialising in government and constitutions, was then PVC Planning. Thanks to him the OU was the only university mentioned by name in the legislation setting up the Scottish and Welsh Higher Education Funding Councils. To me, freshly arrived from federal Canada, the naivety of the Westminster civil servants was breathtaking. They genuinely assumed that federalising UK higher education would make no practical difference and

that Scotland and Wales would continue to adopt the policies emanating from Westminster. They were proved wrong within months. If a country gives policy responsibility to junior levels of government they run with it – otherwise why do it?

In the event, the government agreed that, until the new federal system bedded down, the Higher Education Funding Council for England would fund the OU for its activities in all the home countries. As HEFCE developed its policies the OU campaigned hard and successfully for two outcomes: first, that there be a common funding framework for all institutions and, second, that quality assurance procedures be the same for all.

The common funding policy that emerged, which encouraged growth at low cost, enabled the OU to increase enrolments significantly through the 1990s. When it had been funded directly by government the OU was not allowed to have an annual deficit or surplus of more than about £100,000, but once the new policy freed us from this restriction we accumulated reserves at a good clip, putting aside about £100 million by the end of the decade.

Having reserves allowed the OU, for the first time its history, to make strategic investments, and that brings me to KMI. You all know that the OU got into interactive media very early, offering courses including what was called ‘computer conferencing’ by the end of the 1980s. The key factor determining the speed at which we could make our teaching technologically richer was the willingness of students to acquire the necessary devices and learn to use them.

When I attended the annual conference of the OU Student Association (OUSA) early in the 1990s, I was scheduled to speak in the middle of a debate whose tenor was hostile to technology. After I spoke, using my laptop as a prompter as I usually did, there were criticisms that the OU was moving too fast into what we then called ‘home computing’ and leaving the poorer students behind. But three years later, after the OUSA Executive had started using online communication extensively in its own work, I was berated at the same conference for not moving fast enough!

This encouraged me to draft a proposal called INSTILL over the 1994 Christmas break. INSTILL stood for Integrating New Systems and Technologies into Lifelong Learning. The idea was to take advantage of the OU’s healthy reserves to invest £10 million in various initiatives that would advance our use of technology in teaching and learning. This was the first time that the OU had ever had the possibility of investing serious money from outside the normal budgeting process and it did not pass unnoticed.

Senate was a bit sceptical because Deans and others could think of lots of things other than technology to spend money on. However, there were also many people who felt that the OU needed to raise its game in using technology and, of course, some stood to benefit from particular items in the investment. Council, on the other hand, was enthusiastic and some lay members told me I should have asked for more than \$10 million. This suggested

that I hit the right point in balancing the views of Senate and Council – a key goal for any VC!

The project had several facets and its overall effect was to raise the number of OU students online from 5,000 in 1995 to 50,000 in 1999 and 110,000 in 2000. INSTILL was formally assessed by the Finance Committee some years later and it concluded that this had been a worthwhile and well-targeted investment.

Its highest profile component, of course, was the creation of the Knowledge Media Institute (KMi). Kitty Chisholm put this together by persuading Tom Vincent, Marc Eisenstadt and Paul Bacsich to pool their efforts and then urging me to support a new unit for them.

KMi's success exceeded my wildest expectations. It quickly put the OU on the world map as a centre for leading edge research and development on the Internet. But, equally importantly, KMi continued to be deeply rooted in the OU, helped many units to implement some of its innovations at scale and showed them how to use online technology in new ways. Of all the initiatives launched at the OU in my time KMi is the one of which I am most proud.

Others today will celebrate KMi's many recent achievements under the leadership of Peter Scott more knowledgeably than I can, so I shall end by expanding my focus and praising the OU's contribution to the development and use of educational technology over nearly half a century. I titled these remarks *The Open University and Knowledge Media: Pioneering Progress and Institutionalising Innovation*.

When he stood down as VC in 1980 Walter Perry claimed that the OU had institutionalised innovation. This was a brave claim but I believe the OU can still make it today, thanks in particular to your work at KMi. The OU pioneered progress in using technology and media in higher education right from the start.

I have just read, with enormous pleasure, Professor Tony Bates' magisterial new book *Teaching in a Digital Age*. Many of you will know Tony. He was the 20th person appointed to the OU staff in 1969 and led research on the OU's use of media until he left for British Columbia in 1989. Three years ago, when I helped to organise UNESCO's World Conference on Open Educational Resources, Tony something of a sceptic about OER, so I was pleased to see that his new book has been published as an OER. You can download it as eBook from BC Campus.

One very pleasing feature of the book is its many references to the OU's research on teaching media from the 1970s onwards. Today, when you can mix many media in online courses, less attention is paid to assessing the special strengths that each medium brings. But forty years ago when TV, for example, was an expensive and scarce resource, the OU did much careful research on how to use it effectively. This research is as valid today as it ever was and Tony presents it in a contemporary light.

Pioneering progress and institutionalising innovation: the theme of the INSTILL initiative and the creation of KMi was the *integration* of online technology into the OU's evolving teaching and learning system. Evolution, not revolution, was the name of our game. But although I thought that was right, I was seriously rattled by the dot.com frenzy that lasted from autumn 1999 to spring 2000.

The press was full of stories about the Internet sweeping away all previous approaches to education. Some had the nerve to refer to the OU as 'legacy distance education'. A particularly aggressive American dot.com that wanted to partner with the OU told us that if we didn't play ball it would buy the OU. Fortunately Diana Laurillard, then PVC for Learning Technologies, who is very wise in these matters, calmed me down and reassured me that evolution was right.

KMi is a huge asset to the OU in that process of evolution. Your antennae detect trends before they appear and your research on new technologies sorts out the wheat from the chaff. Thanks to you today's OU operates online at industrial strength.

I am so proud that KMI was created on my watch and I thank you for the extraordinary way you have fulfilled the vision that inspired us to set it up.