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Title of Thesis: DISTANCE EDUCATION AND TEACHER
PROFESSIONAL DEVELOPMENT IN THE
CARIBBEAN - A Case Study of Programme
Development

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ABSTRACT

Title: Distance Education and Teacher Professional Development in the Caribbean - A Case Study of Programme Development.

This thesis examines the role of distance education in teacher professional development in the Caribbean. It does so through a case study of the University of Sheffield's collaborations with regional partners to provide courses at Certificate, Diploma and Masters level. The thesis critically reviews the origins and development of this programme in the context of educational policy and practice in Trinidad and Tobago and explores the subsequent 'caribbeanisation' of the programme. The research, which examines the underlying philosophy that has been driving the programme since its inception, is informed by a close reading of Freire and recognition of the importance of understanding and respecting the cultural inheritance and practices of the learners. Though the research is located within the Caribbean, consideration is given to the effects of globalisation on the education systems of small island developing states and how world classifications are constructed in a manner which tie these countries into states of dependency. Particular attention is given in the thesis to the nature of education collaborations within the settings of developing countries and their role in challenging the cultures of silence which envelop the relationship between developed and developing countries. The thesis argues that distance education is primarily about 'education' and less about 'distance' and that the hidden curriculum is as powerful in this context as it is in a traditional face-to-face University environment.

Ann Cheryl Armstrong

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LIST OF ACRONYMS AND ABBREVIATIONS

ADE	Association for Developmental Education
AIM	Articulated Instructional Media
AOSIS	Alliance of Small Island States
CIDA	Canadian International Development Agency
CIRPE	Caribbean Institute for Research and Professional Education
COMFUT	Committee for the Unification of Teachers
CPPC	Caribbean Programme Policy Committee
CXC	Caribbean Examination Council
DFID	Department for International Development
EI	Education International
FE	Further Education
GNP	Gross National Product
HDI	Human Development Index
IBRD	International Bank for Reconstruction and Development or World Bank
IDB	Inter-American Development Bank
ILO	International Labour Organisation
IMF	International Monetary Fund
NAR	National Alliance for Reconstruction
NIHERST	National Institute of Higher Education Research, Science and Technology
NGO	Non-Governmental Organisation

OAS	Organization of American States
OECS	Organisation of Eastern Caribbean States
OPEC	Organisation of Petroleum Exporting Countries
OU	Open University
PNM	Peoples National Movement
QAA	Quality Assurance Agency
SALCC	Sir Arthur Lewis Community College
SIDS	Small Island Developing States
SLTU	St. Lucia Teachers' Union
SWOT	Strength, Weaknesses, Opportunities, Threats
TASETT	The Association For Special education of Trinidad and Tobago
TTARC	Trinidad and Tobago Association for Retarded Children
T&TUTA	Trinidad and Tobago Unified Teachers Association
T&TUTASEC	Trinidad and Tobago Unified Teachers Association Special Education Committee
UK	United Kingdom
UN	United Nations
UNESCO	United Nations Education, Scientific and Cultural Organisation
US	United States
USA	United States of America
UWI	University of the West Indies

INTRODUCTION: Contextualising the Research

Aims and Objectives

This thesis entitled **Distance Education and Teacher Professional Development in the Caribbean - A Case Study of Programme Development**, will trace the events which led to the University of Sheffield's collaborative effort with the Teachers' Union of Trinidad and Tobago to provide courses in Teacher Professional Development for educators in the dual-island state of Trinidad and Tobago. It will also critically review the development of educational policy and practice in Trinidad and Tobago; evaluate the effectiveness of the distance education programmes implemented by the University of Sheffield in Trinidad and Tobago; monitor the development of teacher professional development programmes in St. Lucia; and, explore issues of Caribbeanisation. Also of significance to the study is the increasing influence by international funding agencies such as the International Bank for Reconstruction and Development (IBRD) or World Bank, the Inter-American Development Bank (IDB) and the International Monetary Fund (IMF) in the post-independence era of the islands of the region. In looking at the history of education policy in Trinidad and Tobago, Namsoo¹ and Armstrong (2000:

¹ Publications prior to 2002 are in the name of Namsoo. My surname is now Armstrong.

28-9) present the following analysis of the situation:

[a]t one level, these agencies can be understood as pursuing a reform agenda aimed at regenerating economic efficiency. However, at another level this loan support engulfs the countries in a manipulative 'debt trap' which seems to run parallel to the political and economic control wielded by the colonial government. Evidence of this is seen during the 1980s when [Trinidad and Tobago] had to undertake severe structural adjustment programmes that were prescribed by the IBRD and the IMF to 'cure' its international debts and balance of payment deficits. This resulted in severe cuts in government allocations to the social services and to education services that were perceived as not contributing directly to the short term economic growth of the economy.

Philosophical and Methodological Underpinning

This research is informed by a close reading of Paulo Freire, a recognition of the importance of understanding and respecting the cultural inheritance and practices of the learners and an interest in the notion of praxis. As such, I have drawn on these concepts to develop the methodology as well as the conceptual framework for the entire study.

A case-study methodology has been adopted to review the introduction of, and demand for, teacher professional development in the Caribbean through distance education programmes offered by the University of Sheffield. Essentially, the case limits itself to the countries of Trinidad

and Tobago and St. Lucia. However, because of the location of these islands some of the findings may be also relevant to other English speaking countries of the Caribbean Region. There are also some small island developing states whose histories may not be dissimilar to those of the Caribbean and so some generalisations where applicable may be made as a result of such similarities.

The four broad classifications of case studies (ethnographic, evaluative, educational and action research) put forward by Stenhouse (1988: 49) were used as a yardstick to determine the scope of this research. He felt that ethnographic case studies related more to the social sciences while the other three were related directly to education. Though he describes them as discrete types, I experienced great difficulty in attempting to strictly categorise 'this' type of case study because there are elements of each of the four classifications in this research.

This work is in part **auto-ethnographical** because it is based partly on my experiences of the Caribbean Programme and attempts through a process of reflexivity to connect the personal to the cultural. This approach has been chosen because it capitalises on the researcher's understanding of the region, thus making it a worthwhile and useful contribution to this research. The attributes which have been important to this exercise are

those of environmental awareness and on-going sensitivity to events and situations; critical awareness of the dynamics of local and regional contexts; being in touch with the social and cultural changes of the people; perceptual objectivity in order to distinguish between one's own thinking and constructs as opposed to those of others; and, an ongoing reflection on oneself in relation the ever-emerging circumstances of the research.

As an **evaluative study**, this is a large singular case with several sub-units which is being studied in depth, in order to shed some light on the relevance of existing policies, the quality of the courses offered, the perceptions of the various players and the merit of the institutions involved (Stenhouse, 1988: 50). Attempts are made at assessing and explaining the findings. Partlett and Hamilton (1977) refer to this type of study as an illuminative evaluation.

As an **educational study**, it is also concerned with '... the understanding of educational action'. There is an analysis of what appears to be an emerging philosophy upon which the programme was and continues to be based and there is an engagement with educational theory and a "... systematic and reflective documentation of evidence" to that effect (Stenhouse, 1988: 50).

Finally, **as action research**, particularly in the case of St. Lucia, the research has always been about providing on-going feedback for further refinement of the courses offered and guiding of the administrative practices.

This approach has been chosen for several reasons. The most important one to me was the fact that there was no one repository of knowledge or information about the particular situation, though the seed was sown since 1987 with many ground-breaking opportunities taking place along the way. The desire was to formally document the history so that it could become archival and be available for subsequent re-interpretations. Also, according to Adelman et al (1980: 59-60), by carefully planning and conducting a case study research, one may be able to recognise the complexity and 'embeddedness' of social truths within the case and the researcher may be able to offer "some support to alternative interpretations". As such, if studied carefully, this particular case, which is the study of a large singularity may be able to provide the data which could later assist in the development of theories pertaining to the policy and practice of higher education within an entire geographical region and/or Small Island Developing States (SIDS).

The multi-dimensional nature of the research also provides the scope for

the application of both qualitative as well as quantitative approaches. This has undoubtedly added a greater depth of meaning to the research.

My Roles and Involvement

Stake (1995) suggests that the case researcher plays many roles during the life of the research and can certainly choose from a range of options how they will be enacted. My own situation however, is more unusual because the roles that I have played in this programme extend far beyond the three years of research for this PhD. It began in 1987 when the first 'real' link was made between teachers from Trinidad and Tobago and the University of Sheffield. A vacation school programme was conducted for teachers in Trinidad and Tobago to which two lecturers from the then Division of Education at the University of Sheffield were invited to conduct some sessions.

I played an integral role in organising their visit and making an input into the programme. Since then, I have played many roles, including that of student, participant observer, interviewer, evaluator, administrator, lecturer, consultant as well as 'border crosser' from the Caribbean. Because of my long and varied history with the programme, I have amassed a wide assortment of data ranging from brochures from the first

vacation school, course booklets, reports, evaluation findings from previous cohorts, minutes of meetings, a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis from the local tutors as well as current data from present cohorts.

Though some may argue that my view would be too close to be objective, I would argue that my view as an 'insider' researcher has allowed me almost immediate access to a first-hand understanding of the history, culture and nuances of the programme from many different angles and this input is therefore vitally important for any story or stories emerging out of the programme. Exploring the histories of some of the marginalized groups from the Caribbean has also added a dimension of emancipatory research to the study. As an 'insider' (Caribbean educator/administrator), some of the knowledge was located within the social history of the researcher and her teaching community. That provided a specific vantage point from which to see and interpret the world. This awareness has been used as a tool of social liberation because it has been used to identify what is noteworthy, what needs to be changed or modified and the processes which could help or hinder such change. As such, the recommendations which are made in this thesis are based on the combination of information which I have gleaned from the research, my observations and experiences over the past fourteen years

and my researcher's intuition or what some might refer to as my theoretical sensitivity to the research.

This research has not simply comprised the application of technical skills, such as designing and administering questionnaires, conducting interviews and focus group sessions and so on but, as hinted by (Barton, 1988:87), it became a series of rather intense social experiences. In attempting to engage critically with stakeholders past and present, I had to be reflective and examine my own interest and role in the evolution of the programme. In doing so, I had to come to terms with the methods that I had chosen, my commitments to myself and others, my excitement about the work and possible prospects, my anger at systems and situations which were often beyond my control and the various mistakes of the research act itself because as Clough (1995:138) explains;

we do not come innocent to a [research] task, or a situation of events; rather we wilfully situate these events not merely in the institutional meaning which our profession provides but also, in the same moment, constitute them as expressions of our selves.

With that same breath, I also think that it is precisely because of my varied experience in the Caribbean as an educator, researcher and a student that the research process was for me, filled with serious hope, earth-shattering fears, nail-biting frustrations and some built-in assumptions which could

either work for me, by enhancing the quality of my perceptions, or against me by providing me with a false and over-inflated status of 'expert'. This research has allowed me the space to re-discover and re-evaluate my *raison d'être*. I have endeavoured, as advised by Mills (1970:245/6), to "[b]e a good craftsman ...[and] to seek to develop and use the sociological imagination" remembering all the while that "(s)cholarship is a choice of how to live as well as a choice of career" (Mills, 1970:216). John Willinsky, in his latest book entitled "If Only We Knew: Increasing the public value of social science research" makes a powerful statement about researchers and their perceived contribution to public knowledge. He says:

(r)esearchers may imagine themselves to be working on permanent lasting contributions to knowledge, and a few may well be doing so, but such aspirations need to be integrated with current responsibilities to advancing public knowledge, where their work is most likely to do some lasting good. The knowledge lives not as it accumulates, in some sort of continuous streaming forward, but only as it is reworked, rethought, and reinterpreted. ... Researchers work by the light both of the past and of their own lives in framing, articulating, and modelling, in the name of knowledge, what might otherwise be the blur of public traffic.

(Willinsky, 2000: 28)

Tensions of the Insider Researcher

One of the tensions that I experienced at the onset of the research was whether my work would be seen as credible both by the Caribbean team

as well as by the Sheffield team. Whether that was true or not, in my head I was always wondering. Whilst I was a student in the School of Education, I was intensely aware that I was from the Caribbean and whilst I was proud of that fact, I did not want to be seen as being overly subjective and biased in favour of the Caribbean. I wanted my work to be recognised because it was about identifying the real issues about higher education via a distance learning mode in developing islands and trying to develop a strategy which would point a way forward for both parties.

Sometimes I was torn between wanting to intervene in a situation to make it work right and being the researcher who would observe what was happening and record it as I saw it and try to explain or interpret it within the particular context. In the end, I discovered that what was most important to me as a researcher and as a person was my integrity and so, all my decisions were based on that even if it meant falling out with friends and disagreeing strongly with members from the team at Sheffield.

During my data collection visits, I also had to remind myself that though I was back home, I was only there as a 'visitor' and so I could not allow myself to be too caught up 'in the thick of things'. This was sometimes

very stressful and I often had to go away and ponder the significance of that particular situation on the research itself. It was during those times that I appreciated the British use of the expression “hmmmmm” which often stands alone and is a considered stance; as opposed to a Caribbean “Hmm” which is short and sharp and calls one into to almost immediate action while thinking out a solution on the way to sorting out a crisis.

Plan of Research

The multi-dimensional nature of the research project lends itself to both qualitative as well as quantitative methods. The methodology included the following:

Qualitative Approaches

- the review of:
 - Education Policy Documents pertaining to the Caribbean;
 - literature related to the University of Sheffield's distance education programmes in Trinidad as a case study;
 - evaluation data and reports from previous cohorts of the Masters' Programme in Trinidad (prior to 1998);
 - a SWOT analysis conducted with local tutors in Trinidad (1997);
- interviews with key stakeholders of the programme;
- focus group sessions with M.Ed. Students from Trinidad (1998 - 2000);

- participant observation of the development of new teacher professional development programmes in the Caribbean.

Quantitative Approaches

- evaluation questionnaires to students in St. Lucia at the end of each of the for study schools over a two year period (1999 - 2001)

Research Questions

The following were identified as the research questions:

- Is there a future for teacher professional development in the Caribbean using a distance learning mode?
- Can collaborative relationships based on distance education paradigms ever develop to ensure that the host country accepts the challenge of 'ownership' of such programmes?
- How appropriate is it to import distance learning models from developed Western Countries like the UK, especially when those countries were until quite recently colonial powers who built their nation on the slavery of others?
- To what extent has the programme been able to develop a curriculum which is appropriate for the needs of educators in the social and cultural contexts of the Caribbean?
- In what ways has the programme through its pedagogy been able to engage with the needs of the educators in the social and cultural contexts of the Caribbean?
- How effective are the programmes of distance education implemented by the University of Sheffield in the Caribbean?

Overview of the Chapters

The Introduction has contextualised the research, by presenting the aims and objectives which it hopes to achieve. It also presents a view of my stake in the project as a researcher and explains my internal dilemmas and challenges. The main research questions have been identified and the structure of the presentation is outlined.

Chapter One explores the principles and practices, history and theoretical approaches involved in the field of distance education and examines the minefield of terminology and definitions which exist in the literature today. The history of distance education as well as some of the philosophical positions which have been articulated by the theoreticians are also discussed. It is entitled *Distance Education Principles and Practices*.

In Chapter Two which is entitled *Globalisation, Distance Education and Higher Education Policy in the 21st Century: An International Perspective*, I will explore various definitions and concepts related to 'globalisation' and review how the University as an institution of higher education has been transformed between the 19th century and the present time. Higher Education policy will also be looked at in the context of globalisation as well as distance education policy and practice.

Chapter Three is entitled *Distance Education in Small Island Developing States (SIDS)*. The core discussion in this chapter revolves around the uniqueness of SIDS and the advantages as well as the challenges which have become a part of their everyday experiences. I discuss how first world classifications are constructed in a manner which will always tie small developing countries into states of dependency. The chapter also considers the effects of globalisation on their education systems; their experiences of distance education in a higher education context and their overall development and international standing. Finally, I also argue that distance education is primarily about education and that a hidden curriculum is as much applicable to this form of education as it is to a traditional face-to-face University environment, especially in the context of globalisation. I consider the implications of this hidden curriculum for small island developing states engaged with education made available by external providers (with particular reference to the Caribbean).

Chapter Four looks at *Teacher Education in the British West Indian Colonies*. It begins with a brief overview of slavery and indentureship and the impact of these upon the development of education. It continues with a broad overview of the history of education and teacher education in the British West Indies with a focus on Trinidad and Tobago, because of the particular significance of that country to this thesis.

Chapter Five discusses *Methodology and Methodological Approaches* and therefore highlights the methodological stance which underpins this research. It outlines the advantages and disadvantages of the various methods of qualitative and quantitative data collection and analysis as it relates to my proposed area of research and discusses the challenges of data collection experienced to date. This is an attempt to develop a theory of educational practice suited to educators in the Caribbean.

The discussion in Chapter Six traces the major developments in education in Trinidad and Tobago during the late 1950s continuing to the 1990s and shows how post-independence developments in Special Education provided the opportunity for the germination of a relationship between local teachers there and the University of Sheffield. It will also highlight the role of non-governmental organisations in the development of this relationship. This Chapter is called *Linking Post Independence Developments in Education with the University of Sheffield*.

Chapter Seven is a discursive move *Towards a Critical Pedagogy for Teacher Professional Development in the Caribbean*. It examines the underlying philosophy which has been driving the programme since its inception. It explores Freire's concepts of 'critical pedagogy' and 'liberatory education' in

the Caribbean context and their application in the process of teacher professional development. Consideration is given to the possibility of genuine collaborations which move beyond what Freire has called the 'culture of silence'.

Chapter Eight brings us up to the present time and delves into the St. Lucian experience. Students are tracked over a two-year Masters programme during the first cycle of the Masters Course in that country. Some links are made with data from previous Masters Courses in Trinidad. Evaluation questionnaires have been used to capture some of the students experiences of the programme and the emphasis is on *Understanding the Learners*. In this chapter, I have developed profiles of the distance learner in the University's courses in Trinidad and Tobago and St Lucia and identified some of the issues pertaining to those students. The data also draws attention to the need for strong pre-enrolment counselling and/or a mandatory induction programme.

Chapter Nine is entitled *Supporting the Learners*. Using the feedback from M.Ed. students in Trinidad and St. Lucia as well as local tutors in the Caribbean, this chapter explores the importance of local tutorial support. The data also highlights the absolute necessity of ensuring that adequate library provisions are a fundamental aspect of the structure of

any course and that this provision needs to be in place before teaching begins.

Chapter Ten explores data from the first cohort of students in St. Lucia (1999 - 2001) and is entitled *Listening to the Learners and Meeting their Expectations*. It identifies distance learners as the new consumers and highlights the importance of respecting the feedback provided by them. You get a flavour of the students expectations of the course as well as the levels of fulfilment of that first cohort of students in St. Lucia.

Chapter Eleven, which is entitled *Collaboration, Partnerships and Alliances: Perspectives on the Development of the Programme* looks at the experiences of the collaboration between the University's School of Education and agencies in the Caribbean and identifies the key issues and lessons to be learned from those experiences. I will also look at the views expressed by key Caribbean stakeholders and their experience of the collaboration.

Chapter Twelve, *Future Concerns - Planning for Success* is the final chapter and it highlights the current students' perceptions of the feasibility of the course for other students within the Caribbean Region. It also looks at nine (9) basic rules of engagement which I believe are necessary if distance learning courses in SIDS are to be both academically successful and professionally managed.

The final chapter entitled Conclusion returns to the research questions for a final engagement with the research.

CHAPTER 1 : Distance Education Principles and Practices

Introduction

In these changing times, it is crucial that we re-examine the purpose of education. For example, Holt, Christie and Fry (1997:192) question whether aboriginal education in Australia is:

... mere schooling and qualifications, rather than life-long and life-affirming education which encompasses learning from one another through cultural diversity and integrity? Is it about assimilation and acceptability ... or is it about dignity and discovery?

They suggest that it "... should not just be about perpetuating the status quo and the paraphernalia of power, property, prestige and possessions" (ibid:192). Though these arguments formed part of a discussion related to the quality and delivery of education in Australia for Aborigines, it is an equally relevant set of concerns for those engaged in distance education. Evan and Nation (1996:3) also argue that the concept of education is fraught with contradictions. On one hand, they describe it as 'conservatising' on the other hand it is perceived as the generator of change:

Education is simultaneously a cause, a consequence and a facilitator of change within society. Education is also a 'conservatising' institution to the extent that it is concerned

with fostering established values and knowledge in the rising generation. There are serious contradictions in education's role: on the one hand conserving traditions and, on the other, generating change.

With so many dimensions to education generally, what then is the case of distance education? Do we mean the same thing when we use the term? Currently, the literature available on distance education seems to centre around information technology and it could give the impression that if you are engaged with distance education, then you must be enthusiastic about intricate technological hardware and software or conversely, if you're not engaged with the emerging technologies then you must be doing something that is not authentic or worthy of recognition and certainly OBSOLETE. You are therefore excluded from the current debates because they are taking place at a 'virtual' level.

This begs the question - what is distance education about? Is it about:

- distance - geographical, conceptual, cultural, virtual;
- education (curriculum and pedagogy);
- knowledge;
- technological advances;
- business strategy; or
- a combination of all or some of the above.

Terminology

The term “distance education” really originated with the Germans and their words “fernstudium” and “fernunterricht” which translate into the English words “distance education” and “distance teaching” respectively. It was only after 1983 when the work of German Scholars like Otto Peters had been published in English and through the efforts of authors such as Desmond Keegan (1986) that the term became widespread and popularised.

Keegan (1986, 1990 : 28) in his writings suggests that “[t]he need to clarify terminology is immediate.” This becomes abundantly clear when researching the literature on distance education. It is a generic term which is constantly substituted for other terms which are not necessarily synonymous in nature. For example:

- ‘correspondence education’ or ‘correspondence study’ at the further education level in the United Kingdom;
- ‘home study’ at the further education level and ‘independent study at the higher educational level in the United States;
- ‘external studies’ in Australia;
- ‘distance teaching’ or ‘teaching at a distance’ by the Open University in the United Kingdom;
- ‘télé-enseignement’ in France;
- ‘Fernstudium/Fernunterricht’ in Germany;
- ‘educación a distancia’ in Spain; and,
- ‘teleducacão’ in Portugal.

(Keegan,1986:31; 1990:29)

In some instances, it is even interchanged with terms like 'open learning' which suggests less formal rigidity to access and educational process.

Pioneering Definitions

Shale (1988:25) recognises that "(d)istance education is beset with a remarkable paradox ". Though it is very popular and as Keegan (2000:ix) declares, it is "the flavour of the month" and "the harbinger of the new millennium", Shale (1988:25) referring to the controversy surrounding the definition, remarks that while "it has asserted its existence, ... it cannot define itself." In his discussion on the conceptualisation of distance education, he contends that education is a process not a product and further insists that technological developments are undermining the traditional understandings of difference between distance education and traditional education. He supports the view that distance education is primarily about *education at a distance*, and as such, does not require a definition (Shale, 1988: 25 - 35). Unfortunately, the word 'distance' appears first in the structure of the term, As such, people generally tend to focus on the 'distance' rather than on the 'education'.

Peters (1965; 1968) perceived distance education as an industrial form of teaching and learning and was perceived by some of the contemporary theorists of the time as being harsh. They "...doubted whether his concept of industrialisation [could] be applied to all distance education systems, especially small correspondence schools " (Keegan 1986: 42).

In the 1970s, the educational theorist Michael Moore (1977:8) identified the separation of the teacher from the learner and the use of the technological media as being essential for distance education:

Distance teaching may be defined as the family of instructional methods in which the teaching behaviours are executed apart from the learning behaviours, including those that in a contiguous situation would be performed in the learner's presence, so that communication between the teacher and the learner must be facilitated by print, electronic, mechanical or other devices.

Holmberg (1989:3) who introduced the notion of *guided didactic conversation* into the debates of the 1980s suggested that the term distance education:

...covers the various forms of study at all levels which are not under continuous, immediate supervision of tutors present with their students in lecture rooms or on the same premises, but which, nevertheless, benefit from the planning guidance and tuition of a tutorial organization.

This definition introduced the elements of space between or separation of the teacher and the learner and the planning and guidance undertaken by an educational organisation.

Keegan (1983:503; 1986:43-4; 1990:43) taking a 'middle ground' between the various other considerations during the period of the late 1980s defined distance education in terms of a quasi-permanent separation of teacher and learner; the use of technical media; the provision of two-way communication, and the influence of an educational organisation. He also felt that such programmes were being operationalised from an industrial base, and that this was another identifying feature.

Later in 1996, Michael Moore teamed up with Greg Kearsley (1996:2) and provided other dimensions by suggesting that:

[d]istance education is planned learning that normally occurs in a different place from teaching and as a result requires special techniques of course design, special instructional techniques, special methods of communication by electronic and other technology, as well as special organisational and administrative arrangements.

They argue that distance education exists at various levels and is more than using technology in a conventional classroom setting. It is about providing

instruction and other forms of educational support in times and places which are convenient for learners rather than the teachers or institutions. This speaks to the changing face of higher education which seems to be following the patterns of the business world, by investing in marketing which offers among other things, choice, variety, competitive rates and even some measures of flexibility.

Johnston (1997:108) accommodates the further increase in information technology by defining distance learning as:

(t)he bringing together of teachers, learners, information, resources and learning support systems in a place (real or virtual) beyond the confines of the host institution.

From the definitions, it would appear that the term distance education was based on a spatial concept; that is, education taking place at a location which is geographically removed from the host or educating body.

I would argue that if that is so, then reading a book is about distance education, simply because the author is not delivering a face-to-face lecture to his/her audience. His/Her ideas are placed in a book for the readers'/learners' interpretation. In fact, I would argue further that 'distance' could be understood as the gap between ideas and perceptions and

may not necessarily be based on a spatial concept. If this is so, then within education there already exist distances among and within cultures; between the various perceptions of students; in learning styles; and also, between the reader and the writer in relation to written material.

Rumble (1986) and Moore (1972) recognised that there is some transactional distance in any teaching situation, even when there is face-to-face interaction between the teacher and the learner. Rumble (1986: 8) contends that a traditional student who religiously attends lectures in a traditional institution "... can be at a greater transactional distance than a student on a distance education course who regularly meets, corresponds with, or telephones his tutor". His argument reinforces my position that there can be distance between two people or groups of people even if they occupy the same geographical space (the same building or same room) and there could be more interaction between people who are miles apart geographically. If this argument is to be applied, then what appears to be the important elements in the discussion would be 'communication' and the 'construction of knowledge' (Saba, 1998). It therefore follows that where there is meaningful communication and sufficient space for reflection, the physical distance tends to be psychologically diminished and new knowledge could be developed. Though I would argue that distance education is

fundamentally about education, I would acknowledge that the impact of geographical distance raises another set of questions which will be dealt with in later chapters.

In attempting to deconstruct and / or reconstruct notions of distance education today, it is important to understand it as it is recorded, and to have an understanding of the pioneering work, especially in the area of higher education.

The Early Pioneers of Distance Education

Most writers on the history of distance education would suggest that distance education first began with the advent of the correspondence course. I would argue, though, that distance education began with authors who used a form of writing to communicate and convey meaning for discussion and/or teaching, using a transportable format through the media of papyrus rolls and manuscript. The medium of writing facilitated both the authors who were considered experts, as well as the readers / learners who were willing to read and interpret the prepared material in a different location. Wedemeyer (1981:33) recognised this concept when he declared that:

(w)riting was the first invention to break space-time barriers to learning. Persons who could read could learn from a teacher who was in

another place, even one who had lived at another time. But reading and writing were skills enjoyed by only a small elite [and the acts of teaching and learning were] chained together in space and time.

The Correspondence Course - Generation 1

The name Sir Isaac Pitman is synonymous with Distance Education via the correspondence mode. As the English inventor of shorthand, he officially began teaching such courses by 'penny post' in Bath, England in the 1840s. In that era, the idea was certainly ingenious because the potential for such an audience was limitless. The intention, it would seem, was to assist adults who were unable to attend school during the daytime and the practice consisted of students copying Bible passages in shorthand and returning it to him for correction and grading. This was the beginning of the Pitman Correspondence Colleges (Holmberg, 1995).

According to Borje Holmberg (1995) distance education may have been provided even before this in the USA, since 1728, as evidenced by an advertisement placed in the Boston Gazette of 20 March, 1728 by Caleb Phillipps, Teacher of the New Method of Short Hand. Mr. Phillipps was inviting persons who were interested to participate in a scheme where they

could have "...several lessons sent weekly to them [and] be as perfectly instructed as those that live in Boston" (Battenberg, 1971:44).

In the USA, Anna Eliot Ticknor, daughter of a Harvard University Professor, established the Society to Encourage Study at Home in 1873 and is credited as the person who "... created the method of not only grading, but the exchanging of comments with students" (Holmberg, 1995).

William Rainey Harper, a child prodigy and seminary teacher was an early enthusiast for distance education. He began teaching Hebrew by correspondence in 1882 through the Chautauqua organization in New York State. By the time he moved from Yale where he was awarded his Ph.D., he had already gained considerable experience in teaching via correspondence and later with the assistance of Richard Moulton from the University of Cambridge, UK, he established extension courses by mail as the first president of the newly founded University of Chicago (1891). It is believed that this was the first University based distance education programme in the United States (Ferraro, 1996: online).

The University of London has for most of its existence provided opportunities for higher education to be accessed and pursued at a distance

from its associated educational institutions. Receiving its first charter as a state examining body in 1836, the University of London set about creating local organisations to serve as extension colleges.

The provision of distance education has not been its only (or even necessarily its central) function, ... and, it has been offered ... largely through its examination system.

(Bell & Tight, 1993: 28)

Keegan and Rumble (1982:15) cite this as the beginning of distance education at the university level and explain that in addition to "... the conduct of examinations... [there was the] ... conferring of degrees".

This strategy was used to substantially widen the University's horizons both nationally and internationally through institutions in the colonies and territories. During the 19th Century, this University had increasingly developed links with a number of educational institutions (schools, colleges and universities) throughout the British Isles and overseas. There were also British citizens who lived in different parts of the British colonial empire, who could not attend a University in London so they resorted to correspondence courses where they could write an examination to demonstrate their levels of competence.

This is a classic example of openness where the University was not

concerned with entry requirements or the methods their students used to prepare themselves for the examinations, but they provided access regardless of international borders or the race or religious persuasion of its students. As a result of their openness, they also extended educational opportunities to women and played an important role in the early expansion of higher education and the development of secondary education (Bell and Tight, 1995: 4- 6).

The influence of the University of London in accepting "...external studies as a legitimate and academically valid means of obtaining a degree" cannot be under-estimated (Keegan and Rumble, 1982:16). One of the examining bodies of the University of London is the University of South Africa, formerly known as the University of Good Hope which was founded in 1873 as one of its out-post colleges. Although the institution began teaching at a distance in 1946, it was not formally established as a distance teaching university until 1962 (Boucher, 1973; Holmberg, 1995: 49).

The University of New Zealand which was also established as an examining body in the 1880s subsequently sponsored extramural studies. This responsibility was later transferred to the newly chartered Massey University in 1963. Holmberg (1995: 48) suggests that organised distance

education may have begun in 1856 in Germany through the intervention of a Frenchman named Charles Toussaint and a German named Gustav Langenscheidt. They established a school in Berlin to teach language via correspondence but, it would appear, adequate systems of communication were not established. Though students had opportunities to submit questions, they were not encouraged in that direction. When translated the prospectus read:

“...it would hardly be necessary since everything is fully explained in the course.”

(Bath 1986:62; Holmberg, 1995: 48)

A few years later, in 1898, further pioneering work was done in Sweden when Hermods, which eventually became a universally renowned distance education institution, was established (Holmberg, 1995: 49).

Japan was also a fore-runner of the distance education tradition. In May 1883, a school named Hubunkan offered Chinese literature courses to students who were not part of the traditional campus. Later that year, in September, another school began offering correspondence programmes in stenography and book-keeping. At the turn of the century, an estimated 250,000 to 300,000 students were participating in correspondence courses with the base institution in Japan and the students covering a distributional

area of not only Japan but also China, Korea and even Hawaii (Holmberg 1995; Hisano, 1989: 71; Kato, 1991).

During the 1900s several other Universities were offering distance education courses. Australia's University of Queensland, was the first to be established in that country in 1911 followed by several other institutions. There was also Queen's University in Ontario, Canada which was initiated in 1889.

During the 1960s the principal medium of communication for the correspondence course was print materials which comprised some sort of instructional study guide, with assignments and other forms of correspondence sent by post. Moore and Kearsley (1996:19) believe that even today it is "by far the most popular form of distance education"; and, it is not uncommon for these types of courses to provide some sort of group interaction through face-to-face meetings or study school sessions. Of course, these types of interaction are more likely to happen in courses like teacher training courses where the designers believe that such interactions are a necessary aspect of the entire programme of study (Moore and Kearsley, 1996:12).

The Concept of the Open University - Generation 2

Charles Wedemeyer is often referred to as the father of American distance education. His early approach to distance learning was based on two premises. He believed that nobody should be denied the opportunity to learn. He also supported a liberal philosophy toward distance learning that incorporated concepts like learning autonomy, self-paced instruction, and freedom in goal selection (Rumble, 1992). In Wedemeyer's view, the only way to provide effective distance education is to break the space-time barriers by separating teaching from learning through an institution that is separate from the traditional institution - perhaps a virtual institution (Wedemeyer, 1981:33).

In 1969, Charles Wedemeyer, the Director of the University of Wisconsin's Articulated Instructional Media (AIM) project was invited to Britain to share in the conceptualisation and design of a new higher education system based on this project (Moore, 1987: 43). The result was the Open University (OU). The establishment of the OU in Britain as a degree-granting distance learning institution in 1969, was a significant development in distance education because it adopted a mixed media approach to teaching. Hawkrige (1976) writing about the setting up of this type of University recognised that while

it had become a success, it had also faced disaster and even abolition many times in the space of just a few years. While the sceptics have perceived it as a political toy, an educational publicity stunt and a technological monster and a costly extravagance, those who support the concept refer to it as Britain's most excellent educational provision in the latter half of the twentieth century. They think that it has successfully exploited the use of technology to advance social goals and has also been an influential mechanism in further opportunities in higher education worldwide.

Though relying heavily on correspondence instruction, Open Universities in the 1970s also used "broadcast and recorded media, especially programs distributed by radio, television and audio tapes" (Moore and Kearsley, 1996:19). More importantly, the OU at Milton Keynes in the UK "chose to oppose exclusivity by having no entrance requirements at all" and was thus regarded as a "special case catering for 'second chance' students" (Bell and Tight, 1995: 10). Their response to that perception was to not directly challenge those 'post-war' assumptions but to strategically call attention to "the importance of its tutorial system" and to maintain a "monopoly of the teaching of its own courses" (Bell and Tight, 1995: 10).

Several other factors could be attributed to the success of the OU:

[The] intrinsic power of the idea ... coupled with the strong political will both of the Government during the foundation period and the spokesman of the University

(Holmberg, 1986: 37);

[on one hand, as well as]

the impetus produced by the expansion of adult education, the desire to develop a system for supporting London external degree students and the excitement generated by a series of educational experiments using radio and television.

(Bell & Tight, 1993: 133)

- Generation 3

This use of electronic technology marked the transition to the third generation in the history of distance education where course materials are delivered by the technologies as mediated messages (texts and study guides, sound, pictures or all three) and / or via the various media such as:

... broadcast television or videotape, with interaction by telephone, or both delivery and interaction by telephone, satellite, cable, or ISDN (Integrated Service Digital Network) lines.

(Moore and Kearsley 1996: 20)

- Generation 4

In the 1990s the emerging mode of delivery for distance education was "... based on computer conferencing networks and computer-based multimedia workstations" (Moore and Kearsley (1996:20).

There have been many technological advances which have spawned a highly sophisticated repertoire of electronic tools since the writing of the first academic book and the advent of the correspondence course. However, print continues to be the platform from which distance education is developed and the foundational base from which it evolves. Today, distance education courses are as ubiquitous as the computer and are also offered at numerous Universities throughout the world in countries like the United Kingdom, the United States of America, Germany, Japan, United Soviet Socialist Republic, France, India, Latin America, People's Republic of China, various countries in Africa, Lebanon, the Middle East (Keegan and Rumble, 1982).

Theoretical Approaches to Distance Education

An analysis of the various definitions of distance education which have been put forward by the leading professionals suggest that they are based on the particular philosophical positions which best articulated their perspective.

Early theoreticians like Holmberg, Keegan and Rumble explored the understanding and assumptions of what made distance education different from traditional education. In their attempt to define the unique attributes of such a non-traditional approach, they concluded that:

- a distance learner was one who is physically separated from the teacher (Rumble, 1986)
- had a planned and guided learning experience (Holmberg, 1986),
- and participated in a two-way structured form of communication which is distinct from the traditional form of classroom instruction (Keegan, 1988).

Using a post-industrial model Keegan (1986), identified three historical approaches to the development of distance education as an academic discipline and suggests that the integrated concept of industrialised, open, non-traditional learning would be responsible for changing the practice of

education. He explains that the theory of industrialisation which was presented by Otto Peters (1971) in the 1960s was an approach which attempted to consider distance education as an industrialised form of teaching and learning. Theories of autonomy and the independence of the learner presented by Moore (1973) and Wedemeyer (1977) marked the period of the 1960s and 1970s. Theories of interaction and communication was the third approach which was put forward by Bääth (1982).

Wedemeyer (1981:3), with his vision of breaking 'place-time barriers', suggested that "the human being's continually renewable capacity to learn has been the least appreciated and least exploited human resource". His mission was to provide access to "back door learners" who from time to time may make use of an institution or its processes but whose "initiative and motivation" reside within themselves. Within the changing contexts of present day society, he challenged the concept of "school", questioning whether it was "... a piece of folklore that had outlived its truthfulness" (p.30) and further identified what he felt were the crucial elements of independent learning. These are greater student responsibility, widely available instruction, effective combination of media and methods, adaptation to individual differences, and a wide variety of entry and exit points.

Holmberg (1989:168) summarizes his theoretical approach by stating that ,

Distance education is a concept that covers the learning-teaching activities in the cognitive and/or psycho-motor and affective domains of an individual learner and a supporting organization. It is characterized by non-contiguous communication and can be carried out anywhere and at any time, which makes it attractive to adults with professional and social commitments.

He also advocates that the foundations of distance education theory should be constructed around the concepts of independence, learning, and teaching.

In this statement he explains that:

[m]eaningful learning, which anchors new learning matter in the cognitive structures, not rote learning, is the centre of interest. Teaching is taken to mean facilitation of learning. Individualization of teaching and learning, encouragement of critical thinking, and far-reaching student autonomy are integrated with this view of learning and teaching.

(Holmberg, 1989:161)

Moore (1972; 1990) introduced the concept of "transactional distance" which he suggests is that distance which exists along a continuum and is present in all educational relationships. It is a "psychological and communications space to be crossed, a space of potential misunderstanding between the inputs of the instructor and those of the learner" (Moore, 1993:22), hence the term 'transactional distance'. This distance is "a distance of understandings

and perceptions caused by the geographic distance and is pedagogic in nature”(Moore, 1983:157). A distance education transaction is seen as "an interplay between people who are teachers and learners, in environments that have the special characteristic of being separate from one another, and a consequent set of special teaching and learning behaviors" (Moore & Kearsley, 1996: 200).

Moore proposes that there is a relationship between dialogue and structure and the nature and degree of separation between the learner and the instructor is determined by the amount of dialogue which occurs and the amount of structure which exists in the course design. He believes that the greater distances occur when a programme contains more rigidly applied structure and less student-teacher dialogue.

Saba and Shearer (1994) carry the concept of transactional distance a step further and conclude that as the control of the learner and dialogue increase, transactional distances decrease. They believe that it is the amount of transactions between learner and instructor which creates the distance not the location. This concept is very similar to the one I proposed earlier and has implications for traditional classroom interactions as well as ones which occur at a distance.

Model 1 - The Interaction Model for Distance Education

One theory, which has been developed and expanded upon in distance education literature in the past decade, is the interaction model for distance education. Moore (1996:11) argues that it is 'pedagogically important' for distant learners to have "...sufficient interaction with their instructors to allow an appropriate degree of exchange of ideas and information." The nature and extent of the interaction would be dependent on the "...organizational and designers' teaching philosophy, the nature of the subject matter, the maturity of the students, their location, and the media used in the course."

Moore (1989) and Moore and Kearsley (1996) introduce three types of interaction essential in distance education. There is the level of *learner-content interaction* where students are presented with the knowledge content of the course so that they can "construct their own knowledge ... through a process of accommodating information into previously existing cognitive structures" (Moore and Kearsley, 1996: 128).

Learner-instructor interaction is, as the name implies, the interaction between the learner and the instructor. The instructor through this level of interaction

should assist the learner to interact with the subject matter thus promoting motivation. Feedback from the learner whether it is through dialogue or in the form of an assessment, communicates to the instructor the level of progress made by the learner and the instructor then provides further counselling, support and encouragement to the learners. (Moore and Kearsley 1996: 130)

Learner-learner interaction which could take place with or without the presence of the lecturer is the exchange of information, ideas and dialogue that occur among students about the course. This interaction could take place in a structured or non-structured manner (Moore and Kearsley, 1996: 131).

Recognising that learners may not have basic skills in the use of hardware and software, and are liable to spend an inordinate amount of time familiarising themselves with the equipment, Hillman et al. (1994) added a fourth dimension to Moore's interaction model: *the learner-interface interaction* which would include understanding the use of the interface in all transactions. While agreeing with Moore that the three levels of interaction are important in distance education, Hillman et al (1994) argue that those interactions are fundamental to the effectiveness of distance education

programmes as well as traditional ones and "fail to take into account the interaction that occurs when a learner must use these intervening technologies to communicate with the content, negotiate meaning, and validate knowledge with the instructor and other learners" (pp. 30-31).

I would add that in developing countries, the same applies, though the technology may be used not only to interact with the instruction but to respond to assessment exercises and items of administration.

Independence and Learner Control

The concept of independence and learner control is also receiving attention in the distance education literature. Distance education, in whatever form, generally requires students to become "self-regulated learners"; that is, they must be able to monitor and control their own pace of learning. As this happens, motivation and self-discipline become greater factors in their success or failure. Altmann and Arambasich (1982), and Rotter (1989), concluded that students who perceived that their academic success was as a result of their own personal efforts had an internal locus of control and were more likely to persevere with their education. However, those who felt that their academic performance was attributed to luck or fate or other external

forces had an external locus of control and might not persist as enthusiastically as those who are intrinsically motivated, and are more likely to become drop-outs.

Believing that control is more than independence, Baynton (1992) developed a model that involves arriving at a balance between three factors: the learner's independence or the opportunity to make choices; competence or ability and skill; and, both human and material support. She suggests that any discussion should examine the complex interaction between the teacher and the learner in the distance learning environment.

Social Context

Examining how the social environment affects motivation, attitudes, teaching and learning is another area that is receiving attention in the world of distance education. All humans are nurtured within a culture. This seems to be a natural starting point to learning about other things. McIsaac (1993) recognises that man is essentially a social being, and consideration should be given to the social context in which distance learning takes place. Though some theorists would argue that technology is culturally neutral, and can therefore be used with ease in a variety of settings, there is still the

consideration of the culture of the provider as well as the culture of the recipient. Media, materials and services transferred without consideration of these often result in inappropriate and or less effective educational outcomes.

All individuals bring multiple perspectives to any learning situation as a result of their gender, age, class, ethnicity, disability, sexuality and other forms of difference. Unfortunately, distance education learning activities are frequently used without consideration to the impact on the social environment of the host country. Though computer-mediated communication may reduce discrimination by attempting to provide anonymity for participants in terms of gender, race, sexuality or disability, it could exclude those who are not skilled in conversing via text-based formats.

Toward a Theoretical Foundation

Distance Education continues to be in a state of perpetual flux with some theorists believing that distance education is a stand-alone concept in itself. Shale (1990) recommends that the broader issues in education be examined with a view to scrutinising communication technologies as part of education at a distance. He concludes that:

[i]n sum, distance education ought to be regarded as education at a distance. All of what constitutes the process of education when teacher and student are able to meet face-to-face also constitutes the process of education when teacher and student are physically separated.

(Shale 1990: 334)

Further, he suggests that theoreticians and practitioners should begin to identify common problems and work on solving them rather than emphasising points of difference between distance and traditional education. Perhaps a closer look at the situation would reveal that the general frameworks, conceptual concerns, and research questions of the teaching and learning processes are very similar indeed.

One cannot simply negate the use of technology in education. As traditional education becomes integrated with the new interactive, multimedia technologies, the perception of the role of the teacher could change from fountain of knowledge to 'knowledge facilitator'. Even in traditional education, there is the need to develop a pedagogy that can be as interactive as the competing media and adequately supported by the technology. McIsaac and Gunawardena (1996) [online] also recognise that the real 'driving force' of distance education is the pedagogy.

Considering the rapid rate of technological advances and the wide availability of computer and other electronic networks in institutions and homes, the structure of education will evolve and perhaps the separateness which now exists between distance education and traditional education will merge into one and become the mainstream.

An approach that I support, which is advocated by Hayes (1990) emphasises the view put forward by Knowles (1984:44), which argues for an andragogical, learner-focused foundation where:

adults draw on previous experiences in order
to test the validity of new information.

Sophason and Prescott (1988) propose another more culturally oriented view for theory development. They caution that because of differences in culture what might be considered appropriate in one culture might not be interpreted in the same light by another. Also the basic meanings of some terminology might differ from one country to the next. There may also be obvious language barriers. Historical traditions, religious philosophies and differing orientations towards self expression and social interaction are also societal differences which need to be considered (Pratt, 1989).

Evans and Nation (1992), who have been very progressive thinkers and have moved the debates on open and distance education forward, suggest that we should seek to examine the broader social and historic contexts before entering into discourses about, and offering theories on, open and distance education. They advise that a possible approach towards theory building would be to begin by deconstructing the instructional industrialism of distance education; followed by a construction of a critical approach. These could then be combined with integrated theories of teaching and learning from the humanities and social sciences.

Garrison and Shale (1987) include in their essential criteria for formulation of a distance education theory, the elements of non contiguous communication, two-way interactive communication, and the use of technology to mediate the necessary two-way communication.

Models of Educational Delivery

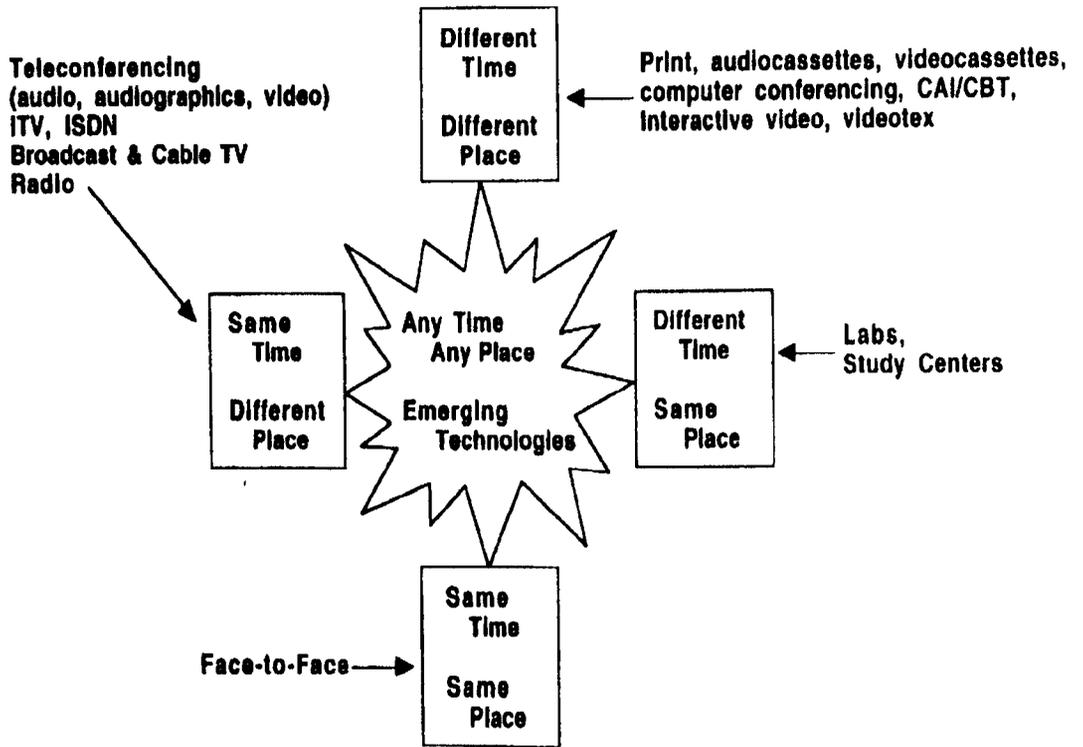
In education, whether in a traditional setting or in a distance learning scenario, appropriate human communication mechanisms need to be adequately established to support the various users groups so that they can communicate effectively with each other. It was recognition of this that gave

rise to proliferation of technologies and models of educational delivery. It is therefore not surprising that these models are directly linked to the development of communication infrastructure. For example, the emergence of the correspondence course as an educational delivery model was based on the emergence of postal systems in various parts of the world; and, the use of the broadcast media for mass education in schools and other institutions became a reality as a result of radio and more recently television (Farrell, 1999:7).

Johansen et al (1991) recognised the need for effective communication and developed “The 4-Square Map of Groupware Options” which is based on research on groupware (a set of software and hardware applications that support group work). The outcome was a very explanatory graphic which clarifies the various technologies which are used in distance education and juxtaposes time with place to arrive at four options: same time/same place; same time/different place; different time/different place; and, different time/same place. (See Figure 1 below)

Figure 1

The Four Square Map of Distance Education Technology Options
(Adapted from R. Johansen, et. al. 1991, p. 16)



Same Time/Same Place Model

The Same Time/Same Place Model of Instruction or group interaction is usually understood as being a face-to-face encounter where the space used is the traditional classroom, rehearsal room, conference room, or computer lab. Some providers also believe that only certain objectives can be achieved by meeting face-to-face interactions. An example of this would be those

institutions who may be providing professional degree courses for teachers.

However, there are those who believe that virtual class space can be classed as same time / same place if for example there is a dedicated server where the students' work is held along with the instructor's materials and that virtual space becomes a 'home-room'.

Some Universities either encourage the congregation of students on campus during specific periods for group interaction or send their representatives to visit them in their own location. Usually, in face-to-face settings, basic technologies that facilitate a face-to-face meeting such as overhead projectors, flip charts, white boards, electronic blackboards or projection systems that displays computer screens via a LCD monitor and paper are accommodated.

Same Time/Different Place Model

The Same Time/Different Place Model of Instruction can take place through a telecommunications medium or teleconferencing, where participants who are separated by geographic distance can interact with each other simultaneously.

An open broadcasting system such as a television or a radio, which is classified as non-interactive media, can also be used. While these are used to instruct a vast number of students at the same time, unfortunately, the students are not provided with a facility for interacting with the deliverers of the programme.

Different Time/Different Place

Some of the tools used in this model may seem to be technologically obsolete. However, they are still very much in use by many students who are engaged in education. For example, print, videocassettes, compact discs, video cassettes, audiocassettes, e-mail, interactive video and computer conferencing all fall into the category of being separated in time and space from the two or more sets of users. Persons who operate under this system can work on different schedules at different times and engage with the items of communication at a time of their own choosing, in a location of their own choosing.

Different Time/Same Place

Some institutions may find it necessary to provide users with assigned working spaces such as study or learning centres or laboratories. Usually, these working areas, offer a wide range of resource materials, and are fairly

accessible to students in terms of geographical location and provide services by staff of the institution. Here learners could have an opportunity to engage in role-paying exercises, and other group activities. While it is not a conventional classroom, it provides the users with a space where they could engage with other persons on the course and access material which could not have been delivered to their workplaces or homes.

Distance Education and the Changing Landscape of Society

It is not surprising that distance learning has become so popular and widespread in the modern world. From the early times of the Greek teachers, Plato and Socrates, several changes have taken in society. For example, over the last ten centuries the population of the world increased in geometric proportions as opposed to arithmetic proportions. Some refer to it as a 'population explosion'. This has automatically increased the number of people who are trying in one way or another to access learning.

Lobbying from powerful interest groups, political and other societal changes, economic changes, changes in the rights of women, ethnic minority groups, disabled people, persons with alternative sexual lifestyles and other marginalized groups suggest that there was also an increase in the number of groups who would be trying to access education. This has translated into an

increase in the demand for varied and interesting forms of education. This makes distance learning very interesting because, at face value, it would appear to be less demanding and rigorous while still being able to deliver the goods in exchange for recognised certification. Persons who have been accustomed to traditional models of education, assume that it will definitely be easier because in the first instance, the teacher is either not there or will be there only on a few occasions. In their mind no lectures or fewer classes translates into less work. What they do not recognise is that with fewer classes there is a greater onus on the student to apply himself or herself to the material presented.

Jobs require more specialist skills and so qualifications are a necessary prerequisite for most. There is also a high demand for some jobs and others are continually being upgraded. As a result, on-going education, or life long learning as it is now being called, is becoming the norm rather than the exception. Some workers are faced with redundancy if they fail to upgrade their skills through continuing education while others who pursue such options of continuing can either be up-graded or re-deployed into new positions which require new skills. Social societal networks have either been decreased or weakened due to urban migration because people have relocated to find suitable employment and possible alternate lifestyles. This

includes access to more varied educational opportunities.

Though there were several events happening all around the world in relation to correspondence / distance education, it was perceived as a poor excuse for 'real' academia and the avenue of inferior quality chosen by people who were not considered to be among the elite and who could not perform better academically and/or could not afford to become full-time resident students at an established educational institution. "The university continued as a cloistered retreat" says Wedemeyer (1981:33) as the stress was on the removal of the learner from the general affairs of everyday life so that education could in some cases begin and in others continue, depending on the philosophical stance / learning of the institution of learning. Potential scholars were expected to sit at the feet of their teacher-mentors. For those who offered correspondence courses, they were perceived as merely conducting a business rather than being in the business of education. The entire notion of correspondence study was an offence to the elite members of society (Pittman, 1991).

Distance education today can be an attractive concept for both the learner as well as the provider. Bartolomé and Underwood (1998:2) suggest that the main stimulus for the development of distance education programmes was

“the need to combine paid work with that of study”. The forms have expanded over the years including not only print-based ‘correspondence’ courses, but also home study and the open and flexible learning programmes associated with Further Education (FE) or post compulsory schooling and in many instances accommodating sophisticated electronic media. The opening of specific Open Universities in various countries dedicated to the provision of distance education courses followed by the development of specifically designed course material to support to the learner at a distance has been a revolutionary step towards the further development of distance education.

There has been tremendous quantitative as well as qualitative expansion in the area of distance education since the 1980s and continuing today. People choose the non-traditional medium of distance education for different reasons. For some the attraction is the favouring of independent learning. For others, the preference is there because “... they cannot - for reasons of job, family, geographical distance, finance etc. - make use of conventional education” (Holmberg, 1995: 51).

As the history illustrates, there are already established universities in the metropolitan countries where distance education courses are being offered alongside their traditional courses because they recognise the changing

needs of their clientele and hope to capitalise on them. The Universities of the World are competing against each other for an increased market share and massive improvements in the area of information technology have provided the capability for new and innovative measures. Recognising that there could be a lucrative market share linked to the provision of distance education, some providers have specifically targeted niche markets while other private enterprises have established themselves as “corporate training networks” with “tele-centres” as the new community based access point where access to information and communication technology devices are provided (Farrell, 1999:7).

Distance education has become a popular way of addressing key current political problems associated with education, because of issues dealing with:

- *Access and equity* - making more places available for persons who wish to engage in post sixteen education and to ensure that groups such as single parents, women, ethnic minorities, the unemployed and those living in remote locations have access to learning opportunities.
- *Economic development and workplace training* - providing a wider range of skills for the workers of the emerging labour markets of the information age.
- *Cost effectiveness of education and training* - providing quality and relevant courses at lower costs in the midst of shrinking educational budgets.

- *Accountability of the education system* - providing cost-effective programmes as a justification for the use of public funds.

(Adapted from Bartolomé and Underwood (1998:1)

Constraints of Distance Education

It is understandable that all teachers everywhere should be concerned with the recurring issues of developing appropriate strategies for motivating students; having clearly defined goals and objectives for their sessions; developing appropriate course material; providing guidance through the distribution of a relevant and current reading lists for the course; and providing timely and helpful feedback for assignments and projects.

For those who teach within the structured environment of a classroom, it is usually possible to draw on a wealth of resources ranging from the abundant literature on a range of topics, to video cassettes, or to CD roms which are available for their support in traditional classroom teaching. Generally, at the tertiary level, there are well documented approaches to teaching which will support even the novice.

Unfortunately, this is not the case with distance education. Though all teachers world-wide may be concerned with the same general issues, no

such facilities are available to the distance teacher. This can be viewed as either a daunting or excitingly challenging experience. It is only during the last twenty years that any great discourse has emerged on distance education as a viable academic discipline (Marland and Store,1986: 137) .

Identifying Distance Education Objectives

Distance Education continues to be a challenging concept because it is not as straight forward as it is made out to be. There are several issues which need to be considered if it is to be delivered in an effective and efficient manner. Firstly, there should be some clear objectives about why that mode of delivery was chosen as opposed to the traditional mode of education. On one hand, the rationale may seem altruistic: expansion of access to meet the needs of 'under-served ' populations. On the other, it is clearly also economic because it seeks to capture an emerging market with a range of attendant opportunities. Universities are also using a distance education mode of delivery as a strategy to 'accommodate' the increase in students without overwhelming their tradition physical capacity. As institutions of higher learning compete against each other for funding and to increase their market share, distance education is being used by the technocrats of the

institutions to strategically transform the institution. This issue will be explored further in Chapter 2.

CHAPTER 2: Globalisation, Distance Education and Higher Education Policy in the 21st Century: An International Perspective

Introduction

'Time' has ceased, 'space' has vanished. We now live in a global village ... a simultaneous happening.

(McLuhan, 1967: 63)

The metaphoric term 'global village' was coined by Marshall McLuhan in the 1960s to highlight the symbolic shrinking of the earth because the increasing use of electronic technology facilitated the simultaneous interaction among people in distant locations with relative ease and speed. Thus, with increased travel and advanced technological achievements, education has become even more internationally mobile. Border crossing among scholars and researchers from the more developed countries of the world is the rule rather than the exception.

The truer concept of this global village is experienced among the first world nations where developments in the areas of digitalisation, mobility and bandwidth have synergistically moved the telecommunications industry forward at 'warp' speed, so that modern day systems are virtually unrecognisable from those of the 1960s or even the 1980s.

However, the concept of the global village is still being conceived by the majority of the world's population because they do not have the resources or the infrastructure to access 'high tech' communication and transportation networks.

Universities are facing many challenges brought about by this changing landscape of the world in the 21st Century. Though globalisation is bringing economic disparity to many regions, through interpenetration of markets and integration, it is also changing the face of education which has now become an international commodity that is bought and sold freely.

The expansion of higher education in the developed world since the 1960s has produced some far reaching effects. In fact the UK and The USA have been dubbed "college or graduate societies" and are now subject to the forces of managerialism and market forces. Funding is now a contentious issue and governments have high aspirations for institutions of higher education, expecting them to be of world class quality, engaging in outstanding research, increasing their participation levels, promoting equality and social inclusion and supporting and enhancing the country's skill base (Smith, 2000). As a result, distance education programmes have expanded world-wide and in recent years have been led by both

technological advances and the marketisation of education in Europe and America.

New courses are being developed to service either a wider cross-section of people or niche markets requiring specialised skills and training. This trend has opened up many opportunities for cross-cultural understanding and collaboration, and possibilities are presented for the symbiotic sharing of professional concerns and expertise while working with people across national and cultural boundaries. However, there are several challenges which lie ahead and even more bridges to be crossed.

In this chapter, I will explore various definitions and concepts related to 'globalisation' and review how the University as an institution of higher education has been transformed between the 19th century and the present time. Higher Education policy will also be reviewed in light of globalisation and distance education policy and practice. In the review of higher education policy, reference will be made to policies in Europe, the UK and the USA. However, with regard to policies that are salient to Higher Education by Distance Education, specific reference will be made to the UK because the provider around which this research is based, is a UK institution.

Globalisation: Concepts and Definitions

'Globalisation' is a response to the crisis experienced in the early 1970s within the capitalist economic system, where many transnational corporations, governments of the industrialised countries, and international financial institutions attempted to restructure the world economy, in an effort to restore their decreasing profit levels and ensure the survival of capitalism.

It became a trendy buzzword in the 1980s, the more popular the term 'globalisation' became, the less there was a shared understanding of what it meant. The word began to encapsulate and even replace other fashionable ones like 'internationalisation' which is "...the increasing interwovenness of national economies through international trade"; and, 'transnationalisation' which is "... the increasing organisation or production on a cross-border basis by multinational organisations" (Hoogvelt, 1997: 114). Globalisation has acquired a very broad spectrum of meanings which cover the social, economic and political changes which take place due to this restructuring of the world's economy so that the business sector could discover new ways of maximising their profits. It is therefore no surprise that "the nature and impact of globalisation effects (vary) enormously across different countries, according to their position in the world and the regional economies" (Dale, 1999:2). As a concept, it

became more suitable for "...describing the ever-intensifying networks of cross-border human interaction" (Hoogvelt, 1997: 114).

Arjun Appadurai (1993:28) recognises the complex nature of globalisation and explains that it is:

a complex, overlapping, disjunctive order which cannot any longer be understood in terms of existing centre-periphery models. Nor is it susceptible to simple models of push and pull (re: migration theory), or of surpluses and deficits (re: traditional balance of trade), or of consumers and producers (re: neo-Marxist theories of development).

It is indeed multi-dimensional. Giddens (1990:64) defines globalisation as:

"the intensification of the world wide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa."

He recognises four intersecting levels of globalisation which are labelled as: the world capitalist economy; the international division of labour; the world military order and the nation state system; and, includes a fifth which he refers to as cultural globalisation. Brine (1999:27) likens this to Schiller's (1976) cultural imperialism which "ensures that post colonised nations remain attached to their colonizers".

Cultural globalisation is most visible through the media: television, video, films, music, advertisements and the like. The media dictates the pace and trends of the global market and constructs the form of youth culture and accentuates US hegemonic influence. Cultural globalisation in its many forms seems to be linked to neo-colonialism as well as US imperialism which is perceived as an attempt to claim global supremacy and Americanise the world. Here, the old forms of disparity are compounded by the transnational corporations in a highly complex form, and, result in promoting the traditional inequalities of race, ethnicity, gender and class.

Visible attempts at these are seen through the establishment of agencies such as the International Bank for Reconstruction and Development (IBRD) or the World Bank (1944) and the Truman Doctrine of March 1947 which gave the US the right to intervene in the affairs of other countries in order to protect "free peoples from communist subversion" (Polychroniou 1995:59). It has even been argued that combining the forces of General Agreement on Tariffs and Trade (GATT), the World Bank and North American Free Trade Association, the US coerces other nation states to 'submit to the rules and culture of the global market on a world scale' McMichael (1995:39).

Another aspect of globalisation has been identified by Hutton (1995) and Amin (1997) as '*technological globalisation*' where it has been recognised that there have been changes in the means of production and the movement of capital and these are intricately linked with the economic and cultural aspects of globalisation. This international mobility of capital is not simply about the quick movement of money, it is the way it "is being disconnected from social relationships in which money and wealth were previously embedded." Hence globalisation becomes a process where marginalisation and exclusion are practiced and divisions are increasingly social as opposed to geographic (Hoogvelt,1997: 129).

This era is now referred to as the: 'information society', 'knowledge-based economy', 'digital economy', and 'post-industrial society' because there is a trend in the developed world, at present where technological developments have steered societies towards an economy which is based on the exchange of intangibles such as ideas, information, knowledge and intelligence. By affording the technologically advanced countries of the world greater economic and cultural integration, the concept of globalisation has challenged the traditional understandings of space, time and location by compressing the processes of space and time in relation to the various locations (Harvey, 1989:240). As such, the configuration of the world is changing conceptually and technologically because of the

way we now interpret time and space. It is virtually shrinking in size and at the same time, knowledge creation, manipulation and sharing are becoming an overriding human imperative.

The organisation of space defines social relations in today's world and therefore holds the key to power. For example, through the use of the technology people can enjoy social relations and even organised community relations regardless of the physical territory that they share. By radicalising the concepts of space and time, globalisation has effectively reordered the world into new regional blocs. The emergence of the European Union in an effort to recreate the countries of Europe, is one such example. National boundaries are no longer applicable because these have been over-taken by "the transgressive tendencies of high technology and world culture" (Scott,1998:127). Through the interpenetration of markets, globalisation has resulted in the economic disparity of many regions. The world has been effectively divided into the countries of the North and the countries of the South. At an international level, this redefines who we are economically and politically (Hoogvelt, 1997: 118 -121).

Globalisation and the Transformation of the University

With regard to higher education there is a greater emphasis on supporting distributed learning and networks rather than single organisations; developing multiple skills; promoting continuous learning; increasingly using information and communications technologies (ICTs) as enabling devices and actively pursuing the development of new ICTs. This shakes the traditional understanding of higher education, which was previously interpreted as volumes of knowledge canonised and stored in bound form within austere brick walls.

About one century ago, the university was a very traditional institution where the life of the academic was centred mostly around the institution. This usually guaranteed them relative security and an almost automatic entry into a socially privileged echelon within society. In the developed world, the university was largely a white, male, middle-class club and usually the members did not tolerate 'the other' which comprised of any or all of the following: women, ethnic minorities, the disabled, the working class and non-christians. Rothblatt (2000:4/5) notes that during that era,

(a)cademic communities were not models of toleration; and towards the end of the nineteenth century some academics succumbed to vicious theories of racial inferiority that forever shames them and mars the histories of their countries.

Prior to 1960, the higher education fraternity in the UK was comprised of a small group of elitist universities with 'cliques of experts' within their own separate disciplines who primarily serviced the middle and upper classes of society.

Things have improved significantly since then. Today, the University is called upon to engage in multi-disciplinary projects with various departments and to be pro-active and business oriented in their style of management. They are expected to think and plan strategically and to outline their national as well as international roles within their plans (Scott, 1998: 115). In fact, in today's society, universities are expected to be the model institutions which set an example for society in terms of openness.

This great shift in thinking took place during the decades following post World War II when higher education was increasingly being conceptualised in terms of the masses (Rothblatt,2000). During the pre-World War II era, the number of students was small, and generally came from middle-class families. Young persons from working class backgrounds were excluded from higher education unless they were able to secure a financial benefactor.

Peter Scott (2001) suggests that in the new millennium, higher education will not be improved or adapted, it will be re-formed, that is, formed again. At the moment, the world is shrinking due to the impact of the new technologies, particularly among the countries of the developed world, and new patterns of management are continually emerging. There is also a sharp rise in English Language instruction, and so in order to accommodate the emerging society, higher education is forced to undergo radical and disruptive changes. On the basis of these, Scott (2000:1) deduces that, "... the future will be a foreign country."

In his book on the *Globalization of Higher Education*, Peter Scott takes a critical view of terms such as massification, internationalization and globalization which are currently in use in higher education. He questions whether they can be used to mean the same process or whether they are 'dialectically opposed'. Massification focuses upon the higher educational needs of the masses, that is, the under-represented social groups within a particular society. Internationalisation by contrast, has a more outward looking focus upon enhanced networking among scholars and the expansion of international studentship within universities. The latter has led to a greater emphasis placed upon marketing. Institutions of higher education need to present the 'right' image to all of its varied audiences: 'home grown' students; academics on the international

circuits; and, the politicians who provide funding for such institutions of learning (Scott,1998: 108 - 129) .

Scott (1998) points out that:

(i)n the context of internationalisation, the inequalities between the rich North and the poor South remain prominent, whether the intention is to ameliorate these inequalities through aid or exploit them by trade. (ibid: 126)

The concept of 'internationalization' is made acutely visible within the current educational landscape. What has been referred to as 'Diploma Mills' and even 'Digital Diploma Mills' (electronic universities) in the US, for example, are those universities who are not able to attract a full complement of students in that country because they are not rated highly in terms of academic excellence. They have expanded their programmes via distance education in order to capture overseas markets (Morrow & Torres, 2000:42). They employ intensive marketing strategies in an effort to attract middle-class students with both the social and financial capacity from the developing and emergent countries. In the Caribbean, some of these universities are treated with some scepticism and are referred to as "off-shore" institutions.

Elliott (1998:33) offers the following definition of 'Internationalization':

...a systematic, sustained effort by government to make higher education (HE) institutions more responsive to the challenges of the 'globalization' of the economy and society.

This, he argues, is the strategy that is being used by the present British government to 'make the UK a more internationally competitive trading nation'. Along with the demands for new goods and services across international boundaries, education has also become an international commodity and the provision of higher education is a 'tradable activity' (ibid:32/3). It is expected that trading would extend beyond the UK to countries within the European Union and also to countries in other regions such as Asia and Latin America.

Examining the notion of *massification*, Scott (1998) concludes that higher education is no longer strictly elitist or dominant. Indeed, higher education has broadened to accommodate a range of vocational and other professional options required by other social groups who also belong to this increasingly complex world. New types of institutions are being created and graduates now qualify to fill the middle management strata of society.

Higher Education currently offers not only higher academic qualifications but also varied opportunities for socialising and cultural exchanges

which participants use in both their professional and private lives. In fact, mass higher education seeks to promote greater equality of opportunity and include the un-represented social and ethnic groups within society that may have become frustrated with the previous elitist academic culture (Scott,1998:126).

Analyzing the Modern University

Rothblatt, (2000:6/7) uses four indicators to examine the 'modern university': "the adoption of a research mission; differentiation by function and mission; the development of instruments for measuring and maintaining quality; and ... control over higher education by central (or regional) governments" through patronage.

The **adoption of a research mission** a "nineteenth-century higher education development", challenged the original teaching mission of these institutions and:

profoundly transformed the interior culture of universities, the nature of knowledge production and dissemination, the criteria for measuring academic success, models of organization and governance, funding and physical appearance.

Rothblatt, (2000:6)

The adoption of this new culture internationally become one of the most distinguishing features of a recognised university for which high esteem and status in the world of academia are awarded accordingly.

Differentiation looks at the distinction between 'function' and 'mission' which can be interpreted using the following questions:

Function → *What is the purpose of this institution?*

Mission → *Which population does it target?*

In the United States, this translates into wide variations in the required qualifications for admission and the eventual standard of the degrees achieved. As more institutions strive towards the adoption of business strategies, differentiation is increasingly enacted through niche marketing which seems to have originally evolved as a result of prejudices against various groups based on gender, ethnicity, religion and social class and really capitalises on exclusion and difference (Rothblatt, 2000: 9-10).

In parts of the United Kingdom (England, Wales and Ireland), new non-residential universities were established to provide opportunities for learning for students without the financial resources or social connections. Some institutions were developed to provide under-

graduate and post-graduate training in non-traditional areas such as the performing arts, industrial design and forms of engineering. This was one strategy which aimed to provide access to a wide cross-section of people.

Europe addressed **quality control** issues by creating external examining systems linked to the array of higher education categories. This was to ensure that a certain standard of quality was maintained among institutions of higher education and that qualifications achieved at the end of a course of study were worthy of recognition (Rothblatt, 2000:11 – 13). However as the awards became increasingly recognised both by employers and by the various strata within society, closer attention was paid to the admission requirements which became highly selective in favour of higher achievers. In the US, status was determined by: competing market forces; restricting academic transfers mostly to high achievers or by Universities isolating themselves from the market.

Universities require funding in order to meet their many commitments and this was traditionally acquired through **patronage** from benefactors, endowments, fee-paying students and the government. As a result, universities have never been entirely independent of the state and this continues to contribute to the debate on institutional autonomy. As policy

makers seem to believe that higher education benefits the individual rather than the general society, the popular view of modern-day governments is to tighten public spending on academia.

Within the last few decades, there has been an increase in the number of students in the UK, and this was supported by an opening up of the system where the government made investments in higher education by upgrading former polytechnics to the status of 'new' universities. However, this was happening against the backdrop of decreased public funding per student; and, the movement away from internal accountability to external accountability, resulted in the manifestation of a new type of leadership which seems to be patterned after the practices of the business sector.

Scott (1996:4) recognised that the government could not provide the necessary conditions for free enterprise and as such he predicted that "(e)vents and outcomes will be shaped by the market, not by the government". Elliot (1998:35) agreeing with Scott, argues that the increased availability of choice is an indication of the government's thinking. That is, when customers are provided with a range of choice, there is a proportional increase in the effectiveness and efficiency of those areas of the organisation where the choice has been offered.

A decrease in the amount of funding provided by their departments and an introduction of student fees suggest that the current messages from government policy can also be interpreted as moving towards the restriction of demand. Students are increasingly being viewed as paying customers. Diana Green, Vice Chancellor of the Sheffield Hallam University likens the British higher education system to the under funded crumbling railway system. She argues that :

... the general case for increasing investment in teaching and learning has been obscured by a successful campaign centred on the needs of those universities aspiring to be "world class". This has taken the government's eye off the more fundamental problem of how to reverse the progressive impoverishment of the student experience and achieve its target of widening participation to 50 per cent of those aged under 30.

(Green,2001: 14)

Conditions regarding higher education have also deteriorated in many other leading academic institutions in the world such as Germany and France where students have been protesting against dwindling budgets and poor conditions (Altbach & Davis, 1999).

Rothblatt (2000: 16) has pointed out that though America is currently experiencing prosperity, "... the costs of higher education have outpaced inflation." He observes that in the current scenario, universities will be forced to finance higher education from sources other than the coffers of

central government. It is for this reason that Britain has introduced students' fees. Times Higher Supplement (1999:10) has reported that Universities in Australia have also begun choosing Chancellors from private enterprise (industry or banking) so that as institutions they could stand a better chance of accessing funding from the business sector and philanthropists. The UK has also begun this practice.

Distance Education on a global scale is another response to decreased financial support from governments. Though this educational option is partly supported by a ready market of students who would like to access learning while remaining in their own country, county or district, technological advances have propelled the opportunity forward at an incredible pace. There are some visible benefits to this form of global education such as attracting and supporting a rich diversity of clientele, increasing the access to opportunity to more people, presenting issues which are less insular and more global in nature. The challenges to these advantages are a more inflexible curriculum if the information is to be packaged for individualised consumption and a possible cultural invasion where the solutions which are 'sold' as answers to the problems of the clientele could be construed as cultural imperialism because, they may be applicable in the First World but not in the Third World.

At present, the university is very similar to the economy - blurry with no defined boundaries. It is indeed a borderless era. For example, there are American Universities in the Middle East and European Universities in the Caribbean. Furthermore, research projects are undertaken by consortia with members from different countries. Universities which are steeped in tradition however, do not simply lose their older values, attitudes, governance and structure, they slip into a newer evolutionary phase (Rothblatt, 2000:6). International corporations are also financial backers of research and departments and boundaries are seamless within the slick, smooth veneer of capitalism.

Universities as Organisational Systems

Willis (2000) views distance education as a change process with the potential to become a catalyst for transforming the operations of the traditional educational institution. Hence he says:

“(a)t its core, distance education is a change process, not a delivery system, and higher education culture has historically proven resistant to change. Perhaps the greatest benefit of distance education is its potential role as a catalyst for modifying the way educational institutions do business... For institutions that are up to the challenge, the current interest and growth in distance learning presents a new opportunity.”

Ackoff, 1981 uses a systems theory perspective, to analyse the university. His argument is that if universities are perceived as organizational systems in which all the essential parts are interrelated, and any change that is made to one part will inevitably change the rest, then one can recognise that there are several typologies which can be applied to how they respond to change.

Traditional universities revel in their prestige and believe that this quality is sturdy and will prevail while all else is floundering. They can be seen as living in the present but drawing on the culture of the romanticised past. The management structure is hierarchical, bureaucratic and uses a top-down approach. New approaches to management are resisted because they see no need for adaptation having placed a high value on tradition, continuity and security (Ackoff, 1981).

In some systems, the managers are satisfied with things the way they are and don't feel motivated to tamper with the systems. Again, there is bureaucracy and lots of red tape which slows down the various processes. In a nutshell, bureaucracies protect themselves and any restructuring of the management and administrative system is very slowly operationalised and may never be fully integrated into the whole. Any change or implementation of a procedure takes twice as long as it should

because of the tediousness of the system. Employees are expected to maintain the status quo by toeing the line and not being too creative (Ackoff, 1981). Then, there are those organisations that attempt to predict changes and prepare for them in the best possible manner. They recognise that technology plays an important part in the change process in the modern age and using a top down approach, they ensure that their strategies are put in place so that they can respond adequately when the change occurs (Ackoff, 1981). There are those Universities which are dedicated solely to open and/or distance education, others provide only conventional education and yet others provide a mix of both distance and conventional.

The growth of distance education programmes over the past decade has heightened existing concerns about how to ensure that higher education programmes delivered trans-nationally are of good quality. Faculty issues that may be critical to the discussion of distance education include credentials and experiences; recruiting and evaluating faculty; professional development opportunities; course design and technical support resources; availability and reliability of technology; mentoring opportunities; course evaluation process; and departmental and /or institutional support for faculty initiatives.

Higher Distance Education Policy in the UK

As additional markets have been sought by universities looking for new sources of income, technological developments have created opportunities for expanding beyond traditional markets. Electronic mail, video-conferencing, relatively cheap international travel, together with a market of potential learners increasingly requiring certification which cannot be provided by institutions in their home countries have made the export of information a lucrative trade.

The UK sees itself as a provider of distance education to citizens within its own country as well as to citizens within other countries of the world. The practice of providing courses via distance education has been viewed by many UK institutions as an economical way of expanding their educational activities, increasing their profit margin and establishing educational links in other countries.

As such, the Quality Assurance Agency (QAA) for Higher Education in the UK, at the request of the distance learning community there, developed some Guidelines for the Quality Assurance of Distance Learning in 1999 to provide advice on issues related to quality assurance. These guidelines were in response to the growing concern that distance learning was an expanding field which, if taken abroad, would require

worldwide acceptance based primarily on quality of service. There was also the recognition that strategies which may be appropriate for managing 'on-campus' situations may not necessarily be valid for distance learning situations.

The body which was established in 1997 to allay the fears of the public with regard to the quality of higher education courses, recognises that if Distance Education is to be successful, there must be:

“... a sound and effective logistical and administrative infrastructure to ensure that all participants' activities are co-ordinated and engage with the programme as designed by the provider [and that] ...poor general management of an inadequate administrative infrastructure can negate otherwise good practice in the provision of distance learning.”
(The Quality Assurance Agency for Higher Education, 2000)

The QAA is supposed to review the quality and the standard of the courses being offered by institutions of higher education through an auditing procedure. They also evaluate the arrangements made between institutions and their overseas partners and students. There are 23 precepts focused around guidelines which fall under 6 discrete headings: system design; the management of programme delivery; student development and support; student communication and representation; and, student assessment.

There must be evidence of an integrated approach to distance learning using a proper system design. Academic standards should be established with appropriate verification provided to show that the programme is designed to produce quality. Appropriate approval and review procedures are also essential. There must be an adequate management structure in place to assure high quality and standards in the delivery of the programme with sufficient structure in place for student development and support and ample avenues for student communication and representation. Student assessment must also be of a standard commensurate with that provided in the UK in a course of a similar nature. The main objective is to ensure that as far as possible the quality of the course is of the same academic standard as those being offered in the respective institution.

Emphasis in the guidelines is balanced in favour of student support services because it is believed that the quality of learning from the course is the determinant that will justify the awarding of degrees with international recognition to students who may never physically visit the institutions of learning in the UK. Quality assurance is an international concern among higher education institutions and governments. It is not surprising therefore, that there is at present an International Network of Quality Assurance Agencies in Higher Education with affiliates from 47

countries. Some national agencies which have evolved as a result of initiatives from governments and/or within the higher education sector have been established as independent evaluators to ensure that the quality and standards offered by institutions of higher education are being met.

Higher Education Policy in the Developing World

In the developing countries, higher education policy if it does exist is directly influenced not by their own governments, but by the countries of the developed world through the intervention of their bilateral and multilateral funding agencies. The increasing influence of international funding agencies such as the International Bank for Reconstruction and Development (IBRD) or World Bank, the Inter-American Development Bank (IDB) and the International Monetary Fund (IMF) in the post-independence era of the islands of the Caribbean can be linked directly to globalisation. Their publicised reform agenda was the regeneration of economic effectiveness. Namsoo and Armstrong (1999:30) argue that educational reforms that are funded by multi-national funding agencies:

... are often based upon dogmas imported from the 'First World' that are unrealistic in the conditions prevailing in the developed world. In practice, such policies operate both financially (through interest payments on debt) and ideologically (through the new orthodoxies of marketization and competition) to impose economic controls and political obligations, while ironically restricting genuine development opportunities.

The governments were given the tasks by the funding agencies to raise their internal capital and by attempting this insurmountable task, they became helpless and were now at the mercy of the agencies who then insisted on them adopting policies which "... systematically undercut the capacity of governments to construct educational policies that enhance educational equality or seek to develop some degree of national autonomy in the context of research and development (Morrow & Torres, 2000:43)." In several instances, the 'real' effect of their intervention was the entrapment of several struggling nations in rising debt which was very reminiscent of the political and economic control employed by previous colonial governments. A decline in the 'real' income of the masses further ensured that access to further education and quality health services remained prohibitive.

Moving Towards the Future

Universities continue to be the key research institutions and are responsible for the innovations which have taken place within society especially in the areas of technology and science. As a result of these contributions to society, the traditional research-based university may still sit at the pinnacle of academic systems. However, it is no longer the sole option for those wanting to pursue higher education (Altbach, 2000). The integration of the higher education systems have provided more

opportunities for the growing demands of the changing population which is larger and more diverse. As a result, University policy in terms of the curriculum and its delivery has also had to be to be 'systemitized' and 'industrialized'. Career paths have also widened and new technologies have been introduced into the system with a more comprehensive form of assessment to ensure that a certain standard of quality was consistently attained (Scott, 1998: 115).

Whereas, students in one era would have automatically applied to study in a country which was its former coloniser, this seems to be no longer strictly the case as new regional groupings are developing. For instance, there has been an increase in the number of Caribbean people pursuing higher education in the US because of proximity and the more affordable currency rate of exchange. There seems to be greater opportunity to awarded scholarship grants as well. In times gone by, they would have automatically opted to pursue higher education in the UK. The UK however, has also witnessed a sharp increase in the number of European students who have chosen to pursue higher education there.

Overseas students remain a major source of income for universities and British and American Universities are under great pressure to increase their recruitment drive. In fact, many have attempted to corner their

share of the market by developing outreach systems, establishing local campuses and engaging in franchised relations with local colleges. Universities in the developed countries are also developing collaborative programmes with universities, non-governmental organisations such as teachers' unions, Church groups and private enterprise in the developing and under-developed countries. In this way, students can be classified as 'international' by participating in courses run by institutions in countries which are thousands of miles away, without ever leaving their home.

There is more collaboration among institutions in different countries in both research and teaching based on regional arrangements. These arrangements, according to Scott (1998:119):

(n)o longer ... take the form of Senate House in London presiding rather grandly and distantly over academic arrangements in far-flung parts of the empire.

There can be situations of concern though, where countries which are neither considered to be economically nor strategically important can be excluded from these regional experiences. For these, access remains limited. As Altbach & Davis (1999) explain:

In China and India ... despite dramatic expansion, under five percent of the age group attends postsecondary institutions. In some countries with relatively low per capita income, such as the Philipines, access is high,

while in some wealthier nations, it remains a key point of challenge. Throughout Africa, access is limited to a tiny sector of the population.

Though access and equity are central to the debate on higher education, they are sometimes ignored especially in developing countries where higher education remains only within the reach of the wealthier segments of the urbanised population. Though women have made significant strides in being seen and heard, access for women in some countries also remain restricted and some inequalities still exist (Altbach & Davis, 1999). This is not the case in developing matriachial societies like those of the English-speaking Caribbean where, the women seize every opportunity to enhance their capabilities and make the necessary sacrifices to ensure that they can have access to higher educational opportunities.

Scott (1998: 128) concludes by saying that in spite of its success in the realms of distance education and distributed learning,

... the university still has a very strong sense of place (and) is still very powerful ...(it) is more than a place; it is also a space, a relatively autonomous space protected from the transgressions of politics or the market, a space in which free inquiry and critical learning can flourish.

Based on trends in 1976, Foundation Européenne de la Culture (1976: 145)

predicted that humankind was quickly moving into the era where:

...[e]ducation will in the year 2000 no longer be shut up in its own domain: a person will be able to educate [her or] himself anywhere and under any circumstances. Education will not be reserved for a certain age-group or deemed an activity suited to only one period of life. It will be an education beyond space and time.

This was an entirely true and vivid prediction for persons who live in the developed automated world and for a few in the developing countries. With each new generation, an increasing number of students have become more familiar with computers and other technological hardware and have heightened expectations of the institutions of learning. They have had some experience of computer-based learning in their school days. Some may have had ready access to computers at home and in the work place for those who enter university after beginning employment. Others may even be literate in the use of both general and subject-specific software packages. In addition, they may also have acquired the skills for electronic information retrieval, electronic communication and multimedia presentation of their work.

Their expectation of the higher institution may therefore be much higher than for those students who are currently in attendance. They may expect that the new high-tech institution would be better able to address their educational needs.

Students who choose to study in the UK or with a UK university do so for several reasons. Those from the European Union think that this is a good opportunity to improve their English and to experience another culture. They also pay the subsidised fees of the UK students and are relatively close to home and that makes it somewhat affordable.

Students from other parts of the world who have to pay fees want to feel that they have got a good deal. They sometimes make value for money judgements about educational offers in other countries such as Australia, Canada or the United States. Often they choose Universities where they feel their degrees will have international currency. The work of the British therefore is to continue to persuade potential students that the education offered in the UK is 'world class'.

The paradox to this is that while the rest of the world may have an interest in pursuing education in the UK, the British Immigration authorities and their various High Commissions in developing countries do little to endear potential students to them. They are often cold, brusque and somewhat hostile to them. As a student, you are not made to feel welcome and sometimes have second thoughts about pursuing the venture. It would seem therefore that the British Universities and the Government Offices are working at cross purposes.

CHAPTER 3 : Distance Education Programmes, Globalisation and the Hidden Curriculum in Small Island Developing States (SIDS)

Introduction

The core discussion in this chapter revolves around the uniqueness of Small Island States and the advantages as well as the challenges which have become a part of their everyday experiences. The chapter also considers the effects of globalisation on their education systems; their experiences of distance education in a higher education context; their overall development and international standing; and, how first world classifications are constructed in a manner which will always tie small developing countries into states of dependency. In this chapter, I also argue that distance education is primarily about education and that a hidden curriculum is as much applicable to this form of education as it is to a traditional face-to-face University environment, especially in the context of globalisation. Consideration is given to the implications that this hidden curriculum would have for small island developing states engaged with education (with particular reference to the Caribbean).

Small Island Developing States - Who are they? Where are they?

There are approximately 79 countries in the world with populations

below 1.5 million. Of these, there are two main clusters: 20 are either within or on the rim of the Caribbean and another 20 are in the Pacific Ocean with the majority of them being in the South Pacific. Smaller clusters also exist in the Indian Ocean, Western Europe and the Arabian Peninsula (Packer and Bray, 1993: 107).

Of the 54 independent member countries of the Commonwealth, approximately 43 are small island states found in all continents and all oceans: Africa, Caribbean, Indian and Pacific Oceans, Mediterranean the Pacific and South China Sea. Of these, 36 are members of the United Nations.

They also comprise 25% of developing countries and 19% of the total membership of the United Nations. Almost 50% of these countries support populations of less than 200,000 and some are as small as 100,000. Together small island developing states (SIDS) constitute approximately 5% of the global population. In 1991, these small island and low-lying coastal countries formed themselves into an Alliance of Small Island States (AOSIS) which “... functions primarily [without a regular budget or a secretariat] as an *ad hoc* lobby and negotiating voice for SIDS within the United Nations System.” (Alliance of Small Island States, undated (online); The Commonwealth of Learning, 1993 (online)).

Unique Characteristics of SIDS

Small islands, have many features in common that set them apart from other geographic areas. Because of continuous lobbying by the AOSIS, small island states are increasingly being recognised as a unique category with distinct characteristics and therefore requiring specialised treatment. Countries like these have always seemed attractive to many people. Being the custodians of much of the Earth's marine environment, these countries are linked to notions of the exotic and the romantic and are advertised to the world as ideal tourist destinations (The United Nations University, 1995: online).

Because the interests of people vary widely, the features advertised as attractive are: natural beauty, environmentally unspoilt, recreational opportunities, security and uniqueness of culture. However, for those who inhabit these countries, life is not as idyllic as it is presented by the media (United Nations, 1996). There are both advantages and disadvantages to living on a small island.

Challenges faced by SIDS

Though the islands may have their own distinctive features, they share some challenges which are for the most part common to all. The difficulties they face in the pursuit of sustainable development are not

straightforward and can be particularly severe and complex because of “the interplay of factors such as smallness, remoteness, geographical dispersion, vulnerability to natural disasters and a highly limited internal market” (United Nations, 1996).

In addition to the general problems experienced by developing countries such as economic difficulties and development imperatives prescribed by the developed world, small island developing States also have their own peculiar vulnerabilities and characteristics. The first most obvious challenge which they face is the stigma attached to the classification system that is used by the first world nations and agencies. Classification systems are used all over the world to categorise things for administrative purposes. Various criteria are used in the sorting process and various international agencies have developed specific classifications to achieve the objectives which they set out to achieve.

The United Nations has a classification system based on per capita GNP and the labels used for Developing Countries are ‘Least Developed’, ‘Developing Nations’ and ‘Organisation of Petroleum Exporting Countries (OPEC)’. The World Bank classifies both developed and developing countries based on their per capita income vis. ‘Low Income’, ‘Middle Income’, ‘Upper-Middle Income’ and ‘High Income’.

Indebtedness is another marker that is used and ranges from 'less-indebted' to 'moderately indebted' to 'severely indebted'. The United Nations Development Programme tries to incorporate both economic as well as non-economic factors into their classification system which is based on a Human Development Index (HDI). The HDI is the measure of development and along with per capita income, incorporates longevity, measure of life expectancy at birth and knowledge measured by a weighted average of literacy and mean years of schooling.

The Organisation for Economic Cooperation and Development includes countries which are not in the United Nations system and the classifications used are: Low Income Countries, Middle Income Countries, Newly Industrialised Countries, and OPEC.

It is important to note that the classifications used above are basically economic in nature and that of the hundreds of countries in the world only about 23 have high income status. These 'high income' countries under the guise of agencies such as the IMF, the IBRD, IADB then determine the rules that will govern the rest of the world who will probably never move beyond the developing stages - like a game of snakes and ladders, its very easy to slide down but you are never quite able get to the top.

Michel Chossudovsky (1994), Professor of Economics at the University of Ottawa in his web-based article on Global Impoverishment and the IMF-World Bank Economic Medicine points out that:

Although both the World Bank and the IMF claim to be firmly committed to the goal of poverty alleviation, their policies have led to the economic ruin of many developing countries.

This he argues was a result of macro-stabilisation and structural adjustment programmes which were conditionalities set by these agencies for the renegotiation of the external debts of developing countries. This was contradictory to the spirit of the Bretton Woods agreement which was based on notions of economic reconstruction and the stabilisation of the major exchange rates. Countries who dare to resist these 'destabilising' practices are 'black-listed' resulting in economic repression. Unfortunately, the converse of that is 'economic genocide' which comes with the implementation of structural adjustment policies (ibid: online).

The International Monetary Fund has suggested that because a developing country seems to be performing above the level of the HDI of a developed country in 1870, this is indicative of a positive intervention by the international funding agencies. This is despite the fact that 'real' income levels are a long way below those that existed among developed countries in the same period (1870). In their on-line article entitled

'Globalization: Threat or Opportunity?', the IMF Staff argue that:

A striking inference from the study is a contrast between what may be termed an "income gap" and an "HDI gap". The (inflation-adjusted) income levels of today's poor countries are still well below those of the leading countries in 1870. And the gap in incomes has increased. But judged by their HDIs, today's poor countries are well ahead of where the leading countries were in 1870. This is largely because medical advances and improved living standards have brought strong increases in life expectancy.

(IMF, April 12, 2000: online)

The United Nations (1998:3) expressed its concerns about the imbalance in universal access to Basic Communication and Information Service by commenting:

We are profoundly concerned at the deepening mal-distribution of access, resources and opportunities in the information and communication field. The information technology gap and related inequities between industrialized and developing nations are widening: a new type of poverty - information poverty - looms. Most developing countries, especially the Least Developed Countries (LDC) are not sharing in the communication revolution, since they lack:

- affordable access to core information resources, cutting-edge technology and to sophisticated telecommunication systems and infrastructure;
- the capacity to build, operate, manage, and service the technologies involved;
- policies that promote equitable public participation in the information society as both producers and consumers of both

information and knowledge; and,

- a work force trained to develop, maintain and provide the value-added products and services required by the information economy.

SIDS are further disadvantaged because they may have a narrow range of resources, which forces them into excessive specialisation with limited export volume and are very dependent on international trade. Sometimes the cost of freight is so high that there is little competitive advantage within an international arena. This makes them extremely vulnerable to developments in the global economy and the whims and fancies of the developed world (United Nations, 1994: online).

Although their population density may be high, many small island States have small populations in absolute terms, so the domestic market is insufficient to produce significant economies of scale in several areas, resulting in limited scope for the full exploitation of certain types of highly specialised expertise. Like a vicious circle, the rate of population growth may then exceed the rate of economic growth. In addition, there is usually a high population density especially near towns, which increases the pressure on the already limited resources (United Nations, 1994: online).

These countries are prone to high levels of migration, particularly of skilled human resources: persons seeking more lucrative and fulfilling employment opportunities in the more developed countries of the world. This pattern places an excessive burden on the training facilities and at the same time places small countries in the vulnerable position of having to import high-cost foreign expertise. The wage bill for the civil service / public administration is also very costly and this puts a strain on government's recurrent expenditure (United Nations, 1994: online).

There is sometimes a tendency to overuse the available resources thus resulting in their early depletion. Their fresh water supply is usually threatened and they are particularly vulnerable to natural and environmental disasters which results in them being classified as high-risk entities by insurance and potential investors (United Nations, 1994: online).

Chandra (1995: online) in his presentation at an International Symposium on *Small Islands and Sustainable Development* explains that the historical link between SIDS that have been colonies, and their colonisers, has continued to this day, resulting in a heavy dependence "...on metropolitan countries in a number of crucial areas, such as aid, including budgetary support, markets, imports, technology... education and

military support.” He also commented that this type of dependence also “...affects countries irrespective of size, but its consequences are more debilitating and inescapable” for SIDS (Chandra, 1995:online). This view is also supported by Bray & Packer (1993); and, as Marx (1976: 167) insightfully stated in *The Poverty of Philosophy*:

It is slavery that gave the colonies their value; it is the colonies that have created world trade, and it is world trade that is the precondition of large-scale industry. Thus slavery is an economic category of the greatest importance.

Martin Khor (1995), the current Director of Third World Network, surmised that globalisation is just another term for what peoples of the Third World have referred to as colonisation for several centuries. Thalif Deen (June, 2000) in his article "*Coca-ColoNisation*" of the Third World has extensively quoted the Deputy Secretary-General of the United Nations, Louise Frechette at a United Nations forum. She has argued that the phenomenon of globalisation has both positive as well as negative sides to it. She informed delegates that while it afforded many opportunities to learn from others, it could be very threatening because workers found that their jobs had become "... obsolete through imported technology or foreign competition and [p]arents found their children attracted by products and role models from alien cultures". She acknowledged that:

[i]nstead of widening our choices, globalisation can seem to be forcing us all into the same shallow, consumerist culture -- giving

us the same appetites but leaving us more than ever unequal in our ability to satisfy them. Many millions of people have yet to feel its benefits at all.

(Frechette, 2000 cited in Deen, 2000: online)

This is very true of the countries of the Caribbean and other countries such as Malaysia.

Developing Educational Programmes for Small States

When developing programmes (especially those of an educational nature) for small states, consideration should be given to several important factors.

Although they may be situated near to each other, small island states are not homogeneous and the similarity that an outsider would perceive is merely superficial in nature. A closer investigation would reveal that some of these countries experience **differences of location** even when, geographically, they are in the same region. For example, some like Trinidad share a border with a larger neighbour (in this case, Venezuela). There are mixed relations with this neighbour. Many Venezuelan students visit Trinidad to learn English, businessmen enjoy trade relations and from time to time Trinidadian and Guyanese fishermen (from the neighbouring country of Guyana) end up in Venezuelan prisons with of the extreme strictness of Venezuela's Guardia Nacional.

Some are single islands on their own like St. Lucia whose affiliations with agencies like the Organisation of Eastern Caribbean States (OECS) give it more strength and bargaining power through its membership. The OECS whose membership is comprised of 9 Caribbean Governments and 2 countries with Associate status, was established to:

...promote, within and among its members, cooperation, unity and solidarity: territorial integrity, awareness of international obligations, harmonization of foreign policy, and economic integration.
(IMF Directory of Economic, Commodity and Development Organizations, 2000: online)

Some states comprise two islands like St. Kitts-Nevis and others, like the Bahamas, the Cayman Islands and Turks and Caicos Islands who perceive themselves as being on the periphery of the Caribbean, are comprised of clusters of tiny islands. Though they are all in the Caribbean Sea, they are different one from the other and, some are also more influenced by the US than others.

Some islands are very far from their closest neighbour (as is the case with islands in the Pacific Ocean) while others are very close (as in the Caribbean). One can also imagine that the experience of an island in the Indian Ocean would be very different from an island in the Mediterranean or even in the Caribbean (Comlearn, 1993: online).

Attraction to Distance Education Programmes

There is a much publicised rhetoric about distance education: that it will be the 'cure' to previous issues of access to educational opportunity for those who are disadvantaged, live or work in remote areas, are housebound, and those who are unemployed. Dr. Robin Mason (1999 : 77), refutes the rhetoric by stating that:

...those who are signing up for [distance education] are the advantaged, the upwardly mobile, the "over-employed" (i.e. those are already incredibly busy), and the well educated.

Though the statement refers to European Trends in the Virtual Delivery of Education, it seems to be a universal trend in relation to Higher Education generally.

Mason (1999:77) continues by stating that:

(t)here is evidence from practitioners that virtual education is more appropriate and more successful for the advantaged learner: one who is motivated, had good learning skills, and has easy access to technology.

Though each country has its own *raison d'être* for engaging in distance education practices, it would appear that countries in the developing world are attracted to this mode of delivery because it seems to provide the advantages of "... economy, conquest of distances (geographical) and

mass application” (Koul , 2000: 233).

As such it is perceived by many as “... the ultimate solution to their educational problems” (Koul , 2000: 233). The growth of distance education as a popular vehicle for education has been significantly affected by the development of new technologies which seem to have glamorised distance education, changing its medium from that of a humble correspondence beginning to a modern glitzy field of technopossibilities. As stated in Chapter 1, distance education has become a popular way for addressing key current political problems associated with education, such as **access and equity; economic development and workplace training; cost effectiveness of education and training; accountability of the education system** (Bartolomé and Underwood, 1998:1). While the rest of the world is increasingly touched by the communication revolution, hopeful politicians of the developing world, who believe the rhetoric, ‘jump on to the bandwagon’ proclaiming the virtues of such a revolutionizing intervention. For them, exclusion would be the price for those who are unable to afford or accommodate some aspect of the high-tech equipment.

Some learners and governments are attracted to, and value programmes, where the delivery and content can be customised to suit the specific local

employment and education needs and can accommodate diverse circumstances and fulfill the requirements of *responsiveness and relevance*. They are also attracted by internationally recognised quality and certification and the transferability of academic credits at an international level.

The Hidden Curriculum and Globalisation

One cannot deny that schools, and by extension education, are extremely powerful socialising agents. In education, there is a distinction between 'what is meant to happen', that is, *the officially stated curriculum* which is disseminated by the educational system or institution, and *the hidden curriculum*, which is what teachers and learners actually do and experience in the school environment. The latter is a kind of *de facto* curriculum which is not written or spoken but is implied and is recognised as the non-academic learning that takes place within the 'learning environment'. It is through this elusive and amorphous hidden curriculum that students of all ages learn about relationships, social arrangements and physical settings and are therefore socialised toward a particular ideology. These are transmitted through the display of attitudes, beliefs, opinions, philosophies, dispositions and social skills which are valued by the institution and those who hold power within that institution.

Apple (1980:48; 1982:67) in his interpretation of Bowles and Gintis's *Schooling in Capitalist America* argues that "the hidden curriculum is differentiated by economic class and by one's expected economic trajectory." Students from the lower class of society are taught obedience, neatness and punctuality which are the traits required of unskilled or semi-skilled labour, as opposed to critical thinking, problem solving, flexibility and 'intellectual openmindedness' which are taught and nurtured within the more advanced classes and are the skills required of managers and other leaders of society. This argument provides a very passive view of working class people and is not altogether very realistic, because it is not reflective of the organised struggles of the working classes through trade-unionism, nor does it take into account the fact that students come to the learning situation with their own knowledge about the world and can accept and re-interpret what they perceive to be relevant to them.

On the other hand, Giroux (1980) and Jencks (1979) suggest that schools and teacher education programmes are products of the same society, which, though giving the appearance of being neutral, are not. Inherent in the structure and ideology of teacher education programmes are contradictions which reflect both their social conscience and perceived moral obligation of providing social welfare support, whilst endorsing

their allegiance to the maintenance of a capitalist society. It is within the 'political space' created by this contradiction, that their autonomy lies (Giroux,1980: 20). Given this scenario, it is not impossible for some altruistic teachers with visionary and pioneering spirits to be motivated to develop courses which are ground-breaking in their philosophical approach and exceptional in its pedagogic offerings. As Giroux (1980: 21) explains:

(s)tudents in teacher education must learn that knowledge is a socially constructed phenomenon and that methodological inquiry is never value-free.

Because the messages of the hidden curriculum may become internalised and automatic, one needs to ask the question whether it is possible that these intangibles could be transmitted through the medium of distance. If this is the case, how then is the hidden curriculum manifested within the context of distance education? Blumberg and Blumberg (1994) argue that this unwritten curriculum is not deliberately set by anyone but is a by-product of the education system. Seddon (1983: 1-6) contends that the hidden curriculum involves the learning of intangibles like values and attitudes, norms and beliefs. Assumptions which are made about the rules, rituals and regulations which exist are rarely questioned, and the status quo is maintained. While he believes that the hidden curriculum can only be deemed positive or negative based on the value position of

the person concerned, I would argue that entire systems and institutions by their very operational nature transmit their own organisational culture which reflects the hidden curriculum.

It would also seem therefore that the hidden curriculum in distance education is transmitted not only through '*cultural globalisation*' which Brine (1999:27) equates with Schiller's (1976) cultural imperialism but also through '*technological globalisation*' (Hutton, 1995; Amin, 1997). This view is in direct contrast to the argument put forward by Isaac & Gunawardena (1996, online) who state that "the technology itself is neutral". I would agree with them though that the pedagogy is the real "driving force" (ibid) but would go one step further by arguing that the technology cannot be neutral if it is used to politically negotiate status in the world arena, through the '*new geography of power*' (Sassen: 2000: online).

Issues related to the Implementation of Distance Education Programmes in SIDS

Because of the ravages of history, increased travel, technological advancement and other media where ideas and practices are exchanged, no nation or culture is truly independent in terms of intellectual life, and all depend to some extent on an exchange of knowledge. It follows therefore that the more "modern" a nation is in terms of its involvement

with technology, degree of industrialisation, and current political and social thought, the more dependent it tends to be on the audience of an international network for the creation and distribution of knowledge through books, films, consultants, students, translations of publications (Altbach, 1978:301).

Taufe'ulungaki (1987: 88-9), a Tongan educator, was able to aptly elucidate the specific post-colonial challenges faced by the newly emerging states of the Pacific region with regard to reconstruction of an education system by stating that:

(t)o revolutionise an entire education system from its structure, to administration, to its curricula, to its training, to its goals, requires capital and professional expertise, neither of which was available in any appreciable quantity or number in any of the small countries of the region. To continue to maintain colonial practices was emotionally abhorrent but any major revolutionary change was equally unaffordable.

Like the countries of the Pacific, the education systems of the Caribbean countries were fashioned after the education systems of the colonisers and relevance only became an issue after Independence when people began to question the appropriateness of the material to the needs of the emerging societies.

The developing world, then, has escaped colonial bondage only to enter into an era of neo-colonialism dependency. Neo-colonialism in this context refers to the continuing domination, direct or indirect, of the industrialised nations over the lesser developed countries of the World. The post colonial situation is, of course, much more complicated than traditional colonialism, since in theory, these developing countries technically have the freedom to shape their own destinies. However, in the real world, the rules of the political and economic interactions are largely determined by the developed 1st World and so, the developing countries of the world are still in many ways under the influence of former colonial powers and other industrialised nations (Altbach, 1978:301).

This is all taking place within the context of globalisation which, though giving the impression that the world is getting smaller is, in fact, imposing new economic boundaries on the world by favouring emerging trans-national co-operations and may even reinforce the old ones which automatically favour the First World Countries.

Alongside these issues related to globalisation and colonialism, distance education as another vehicle for education has experienced its fair share of challenges. For example, when considering prospects for sustainable

development of a distance education programme, one recognises that small states could easily fall short of maintaining a cost-effective quota. Arguments which can be used in support of distance education such as 'economies of scale', and 'education for masses' which can be used by large countries, mitigate against the viability of distance education in small states. Small island developing states possess characteristics which are special to them. When compared with large states, they have relatively small populations, short traveling distances and "...the tendency of reaching saturation levels in short periods of time" (Koul, 2000: 233).

Though this would suggest that is difficult to justify the use of distance learning technologies, this is not necessarily the case with these countries. Often, international funding grants are tagged to the development of distance education and other educational initiatives which may be justifiable only in contextually similar situations and not necessarily be applicable to the requirements of small states (Koul, 2000: 233).

Communication and Technology

The concept of the global village, spawned by the effects of globalisation, is still being conceived since the majority of the world's population does not have the resources or the infrastructure to access high tech

communication and transportation networks. The truer concept of this global village is experienced among the first world nations where developments in the areas of digitalisation, mobility and bandwidth have synergistically moved the telecommunications industry forward at 'warp' speed so that modern day systems are virtually unrecognisable from those of 1985.

Technology is a much sought after commodity in the emerging distance education arena. It would be safe to state that regardless of the proposed method of delivery of the provider institution, some form of technology would be used as part of the communication procedures. Again, hopeful politicians and those with limited knowledge about the intricacies of how it works seem to be intrigued by the promises of potential profit and success emanating from cutting edge technology and there seems to be a rush to implement web-supporting instruction and video-conferencing without an in-depth needs analysis of the situation being conducted.

Possibilities are presented for the symbiotic sharing of professional concerns and expertise while working with people across national and cultural boundaries. The world-wide expansion of distance education programmes in recent years has been led by both technological advances and the marketisation of education in Europe and America.

As additional markets have been sought by universities looking for new sources of income, technological developments have created opportunities for expanding beyond traditional markets. Electronic mail, video-conferencing, relatively cheap international travel, together with a market of potential learners increasingly requiring certification which cannot be provided by institutions in their home countries have made the export of information a lucrative trade.

In developing countries, and more so in the small island states of the Caribbean, the quest for adequate telecommunications facilities is an on-going and arduous one. While it is recognised that a properly functioning telecommunications system is necessary if one is to negotiate with the developed world, in small island developing states this sector experiences one or more of these problems:

... under-investment, poor management characterised by monopolistic structures and inadequate human resources development, poor maintenance of equipment and networks, low penetration of services, particularly in the rural areas, high tariffs owing to lack of competition and relatively higher unit costs for provision of services.

(UN, 1996: para 54 online)

Equipment maintenance is very often not accommodated into the overall budget or is impractical. For example, though the Caribbean as a region is prone to hurricanes local distribution cables are hung between upright

poles so they become easy victims to gale force winds, falling trees, hurling wind-swept debris from buildings and occasional zaps of lightening. Though the use of underground cable ducts seem to be the practical solution, perhaps it is too costly to implement in the short or even the medium term.

Because human resources development is an ever-increasing investment, foreign-owned public telecommunications operators in developing countries have usually opted for employing expatriate staff rather than investing in the training of the indigenous population.

Globalisation continues to be a double-edged sword for the weaker countries who may find themselves being continuously marginalized.

Already, one sees the widening gap between those who are

... the information poor and the information rich. For this reason, public policy makers must continue to insist upon goals of universal access and affordability, wherever possible. In the absence of such a vision, much of the investment needed to create new services is likely to be targeted at wealthy neighbourhoods, at the expense of the urban poor and those in rural areas.

(UN, 1996: para 54: online)

In some developing regions of the world, there is not sufficient access to the bandwidth which is necessary for running a networked system which

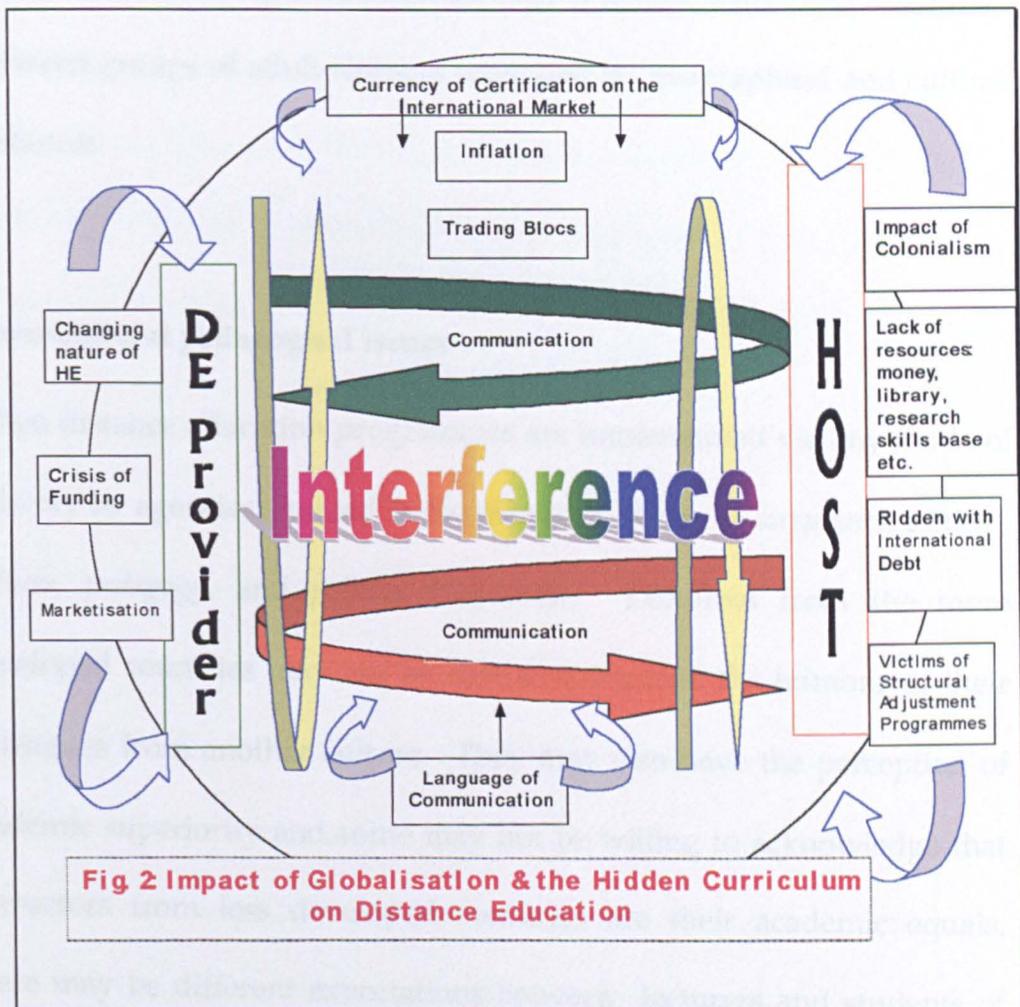
is required to facilitate some types of distance education programmes. While some learners may have access to the technological hardware such as computers and telephones, other may not; and, there may be a wide gap between those who have and those who don't. Even for those who have access to the technology, the telephone may be quite unreliable, restricting use of the internet and e-mail which are now considered as basic communication tools in the metropol. Others, may experience techno-phobia and panic, especially if they had not previously been exposed to the technology until they were mature adults (aged 30 and over).

Using state of the art technology to develop web-based programmes is quite expensive. There is the cost of hardware, software, systems maintenance, upgrades, telecommunication charges, technical support, staff development, programme development, student support systems and other accompanying infra-structural costs. In spite of these challenges, implementing distance education programmes using the technology available can be cost-effective and productive, if courses that are suitable to that sort of medium are capitalized upon. Again, cost benefit analyses with realistic projections should be conducted before commitments are made to any such investments.

One needs to question the applicability of these advancements to the society in which it is to be used. For example, in the Turks and Caicos Island, they have recently installed a Teleconferencing Centre which is supposed to be used as a linking centre for potential students of the University of the West Indies. The Centre is on the island capital, but there are few inhabitants there and the technology would be better served on a more populated island where the demand for such technological intervention is high. If the persons who are expected to participate do not have access to the necessary equipment and/or user skills, then implementation of such a system is pointless.

As with any other programmes, investments need to be made in the areas of research and development in order to maintain a high technological standard. Perhaps the key to maintaining long-term viability in the field is to engage in long-term planning to ensure that the technology that is purchased can be viable for quite a number of years and sustain certain kinds of systems and programmes without becoming quickly obsolete. Keeping up with the technology can be a never-ending struggle, especially if one is trying to maintain a competitive edge ahead of the competition.

Figure 2 below, entitled *The Impact of Globalisation and the Hidden Curriculum on Distance Education* seeks to reflect the confusion caused while providers are trying to communicate with hosts and vice versa.



There may be challenges in correctly interpreting the modes of communication and there is the automatic interference which takes place as a result of geographical distance, globalisation and differing agendas at various levels within the societies (institutional, governmental and

personal). As Michael Apple (1993: 68) graphically states, "...knowledge is filtered through a complicated set of political screens and decisions before it gets to be declared legitimate". This will undoubtedly affect what knowledge is selected for transmission, what knowledge is interpreted and accepted as well as what is taught, learnt and negotiated between groups of adult learners separated by geographical and cultural distances.

Cross-cultural pedagogical issues

When distance education programmes are implemented via any mode of delivery by agencies situated in the metropol, issues of *acceptance, content, culture, pedagogy, and politics* may arise. Lecturers from the more developed countries may not be able to appreciate the humour of their colleagues from another culture. They may also have the perception of academic superiority and some may not be willing to acknowledge that instructors from less developed countries are their academic equals. There may be different expectations between lecturers and students of what is expected. For example, students from some developing countries may expect Western lecturers to be fountains of knowledge while some Western lecturers may expect their students to be more interactive. Conversely, lecturers from other less-interactive cultures may not expect or require student participation. Instructors and students from different

cultures may have differing views on their cultural and economic understandings of the world. Some of the examples used in the teaching materials and discussions may not be culturally, politically or even economically relevant to the students.

There may also be circumstances where instructors have to work within the political framework of the government. For example, in St. Lucia, we were only allowed to deliver Masters of Education programmes because we agreed to structure the course in such a manner that it would support the government in its education development programme.

Access to Academic Literature

Here, the concepts of cultural and technological globalisation are particularly relevant to small island states. Though these developing countries may acquire political independence, they all depend to some extent on the dissemination of knowledge from the developed countries of the north. There are concerns related to accessing publications which reflect the international discourse on ideas, emerging issues and new knowledge. The first world countries are perceived as the creators and publishers of knowledge and when one participates in courses run by the Universities of the developed world, one has to be able to buy into the acquisition of knowledge which is sold at first world prices, in currencies

which far outstrip the economic weight of currencies of the developing world. When you couple that fact with the fact that publishers are members of conglomerates which view institutions of learning as potential customers, the result is a hefty cost of access which can be somewhat prohibitive for students from developing countries. The lack of adequate resources beyond the set readings and required texts is also a cause for much concern as is clearly highlighted by Unwin, Stephens and Bolton (1998:1):

The very fact that DL students have, in general, no ready access to campus facilities means that they present a different challenge to a university provider than do on-campus students.

In some developing countries like those in the Caribbean, the telecommunications and postal systems can be somewhat unreliable as service providers struggle to keep up with technological advances in communication and so "timely and frequent student-to-faculty interactions is one of the most difficult of problems to overcome" (Hall, 1996:11).

When one considers that an estimated 95 percent of all computers are in the developed world and that the 10 developed nations which account for 20 percent of the world's population have 75 percent of the world's telephone lines, one can easily recognize that "... most developing

countries do not have the infra-structure to take part as equal partners in the worldwide enterprise of knowledge production and dissemination” (Arunachalam, 1998).

Although the technology with its digital publishing seems to be reflective of the progress and success of some of the marketed courses, it could also be perceived as a form of techno-colonialism or subtle intellectual warfare used to divide and conquer.

There have also been cases where First World Universities attract students from smaller Third World countries, who are interested in developing professionally. Yet, despite the advertising and the ‘foreignness’ of the University which makes it seem high profile and reputable, these students are extremely disappointed when they realise that there are no adequate support structures for the course, which are sometimes packaged in an extremely sterile manner. They feel especially vulnerable if there are no government agencies to guide them on the selection of these training agencies.

Costs to Students

Advocates of distance education as an appropriate medium of education have argued that this mode can be less expensive than traditional

education systems and that it can also be comparable to these traditional forms in terms of the quality being delivered and subsequently learnt. Whether it is actually cheaper depends on a number of factors, including: choice of media; number of subject areas and courses covered; the extent to which the direct variable student cost is kept below the level found in traditional forms of education; and, the number of students enrolled.

One argument which points to increasing costs for developing countries is that of 'technologization of distance education'. As the new technologies develop and are put into use in the 'advanced industrialised countries, this could easily be translated into increased costs for students - especially those in developing countries (Rumble, 1993:106).

If distance learning programmes are designed within a specific and somewhat restrictive set of parameters in order to ensure that they are cost-effective and fairly easily replicable for use in other countries, then, another concern arises; that is, the amount of effort required to adapt the existing programmes, so that they can effectively cater to the existing needs of the country being supported, without raising questions about standardisation and quality.

If staff from less developed countries are hired, then the cost of labour

will be decreased significantly because often the cost of living there is much lower than in the developed world. This means that institutions wishing to add another cultural dimension to its teaching staff could take advantage of the lower salary requirements of those members of staff in the countries where training is taking place. One can question in this case whether course fees should be significantly lower than those for courses taught in more developed countries. If fees were lower, students whose standard of living is lower would find courses more accessible. On the other hand, reduced costs might be seen as an incentive to first world distance education providers.

Distance Education vs Traditional Education

Some persons continue to interpret distance education as 'the correspondence course' which really translates into a pre-packaged impoverished version of the kind of education which disadvantaged people have been fighting to have access to as adult learners in higher education. On the other hand, the traditional university whose origins lay in church-related activities is perceived as a 'cloistered retreat' where a "...medieval mystique of having passed successfully through a particular regimen [is] related to the "laying of hands" (Wedemeyer, 1981:33).

Though it has been recognised that distance education opens up many opportunities for cross-cultural understanding and collaboration, it is also fraught with difficulties. For example, some authorities argue that distance education has become more learner-centred. What they really mean is that the learner essentially has to be self-directed and take responsibility for his or her own learning and the teacher becomes a resource in the process. However, one can always question to what extent there is room for critical engagement with the material, allowing new thoughts and ideas to emerge. If distance education is simply the transmission of knowledge via the post or the internet, this would result in another form of automatic transmission from the technological North to the developing South.

One of the challenges which exists in education generally is that lecturers who are accustomed to the more didactic teacher-centred approaches may choose to continue in that same vein and use the various modes of operation to dictate a more institution- / lecturer-centred approach to better 'manage' the quantity of students. Some institutions who apply a mixed-mode of delivery engaging both in conventional university education as well as distance education, may consider distance education to be their adopted and less prestigious sibling and so allocate fewer resources to the development of this area of education. As a result, the

instruction could simply be one of 'toeing the line' and so the material developed for a first world country would simply be piped to a less developed country regardless of the applicability or relevance to their situation.

Distance education requires an entirely different type of management structure from that required of traditional university courses. It is more business oriented and some of its success is measured according to the return on investment of the factors of production. An entire production line with quick response rate has to be constructed in order to respond to the demands of this 'real-time' business. How does this reality impact on the hidden curriculum? While some managers of such programmes may feel the need to be more flexible in their approach to management, and while the university may welcome the 'extra' income to be earned from such a venture, the bureaucratic structure of a very traditional university may not be willing to adjust its mechanisms to accommodate this new phenomenon. While it is recommended that 'lecturers' be exposed to training which prepares them for teaching at a distance, they may not be so inclined and / or the institution may not be willing to acknowledge the need to invest in such areas of development.

In many instances of distance education in the Caribbean, though the students may regularly attend group sessions, the lecturers do not see their faces. In the Caribbean where, the oral tradition is very strong, person-to-person communication is transmitted on two levels simultaneously - the verbal and the non-verbal. Using the new technologies of e-mail or audio teleconferencing, while the scribal is seen and the verbal is heard, the non-verbal communication which includes facial expressions, eye contact, tone of voice, body posture and motions, and positioning within groups as well as the way they wear their clothes or the silence they keep, is lost on the instructor. Also, in a culture where as a result of the colonial heritage, students have been automatically relegated to the lower class, and have been taught from childhood to refrain from responding unless one draws attention to oneself politely by raising one's hand, this could be somewhat problematic.

Many distance education courses offered by traditional universities are simply exported adaptations of courses which were designed for the campus-based students. Depending on how the programme is being delivered, there could be a problem of cultural interference and confusion because several cultures intersect at the same time. There is the culture of the content or material, the learner, the University, the lecturer, the

technology, the physical environment of the learner. Jegede (2000:52)

supports this view and further comments that:

the incorporation of the learner's ownership of knowledge and the learner's voice is essential for them to construct language. This is to aid in the production of active, reflective and ampliative learners, who not only generate mental models of what they learn, but also control their internal strategies of learning for meaningful learning to occur. There is a need for further research on the mediating influence of cultures and how they affect learning.

One of the concerns about distance education voiced by some current students, potential students, skeptics, governments, national quality control bodies and some academics from traditional institutions is whether distance education can and will provide "... the same level of academic excellence as courses taught in the traditional mode" (Diaz, 2000).

Opportunities

Though it is acknowledged that the globalisation of educational provision through distance learning systems of delivery carries its own inherent dangers as a colonising and controlling process, it can be argued that developments in distance education pedagogies do offer genuine opportunities for engaging in collaborative, yet critical initiatives and

interventions. This critical pedagogy is one that must be based upon a theoretical and practical engagement with the politics of post-colonialism, drawing upon the mutual analysis of the lived experience of educators and students in the different locations.

As Giroux (1980: 23) advocates:

... prospective teachers be given the concepts and methods to delve into their own biographies, to look at the sedimented history they carry around, and to learn how one's own cultural capital represents a dialectical interplay between private experience and history. Methods of curriculum design, implementation, and evaluation must be seen as a construction in values and ideology. This approach provides the foundation for future teachers to analyse how their own values mediate the classroom structures and student experiences they work with.

History must be used as a tool for critical thinking where they can map out the development of knowledge and recognise how schools were organised based on specific social assumptions and maintained to service specific political and economic interests. Only then can there be open dialogue about possible educational reform.

When attempts are made at providing educational support to small countries from a distance, there is a need to first identify the tensions that could or might exist between insider students and administrators and

outsider providers. Issues which relate to the possible eurocentric nature of the curriculum content and materials are of paramount importance to countries which have a history of colonial rule. Distance education practices could very well be looked upon with a slight frown and perceived as another form of 'instant' consumption by traditionalists who received their tertiary education in a traditional university setting where frequent attendance at lectures was the practised norm.

Rather than begin with the total outfitting of a technological plant for the purposes of education, there should be a planned and gradual phasing in of the technology, where students are incrementally sensitised into working with and through the advanced technology. In this way, there would be less of a culture shock along with a built-in period of acclimatisation.

There are those who also fear that this medium of 'packaged learning' from a first world country, especially one which figured so prominently in their colonial past as another more subtle form of control towards eventual domination. While I would acknowledge that Distance Education is an important medium of education, it is not politically neutral and can easily result in the patronage of the developing world by the developed world. In order to minimise issues related to the hidden

curriculum which arise as a result of the process of globalisation I would advocate that the students would be encouraged to adopt a reflective stance by becoming critical examiners of their experiences, as they question and constantly engage in re-interpreting life (Shor 1993:31).

It would be advisable to employ a local 'gate-opener' from the host country, who can operate at a senior level administratively and who could help to interpret the country's communications codes, while at the same time be ready and willing to assist the learners to cross the academic bridges. Basically First World universities need someone on the ground who could help to translate what are perceived to be 'white middle-class understandings and values' into real life possibilities and opportunities for developing societies who are struggling to have an identity. Students embarking on such courses strive to make a difference within their country and excel at an international standard.

Even though we speak the same language, **we do not** speak the same language - the codes for interpretation are different. Students are very panicky and insecure when they have not used the technology before and in their effort to be polite they sometimes make mistakes in addressing persons. One such an example is referring to females as 'Sir', because they did not realise that the person's name and title was

embedded at the bottom of the e-mail. This may sound silly and trivial but it shows how much persons who are familiar with the technology can take for granted.

Looking at the other side of the coin, I believe that lots of learning needs to take place with regard to the providers of the education. They need to have a critical understanding of the history and the culture of the host country and the lived experiences of the learners in that location in order to recognise that the people of the host country have a contribution to make and secondly to appreciate the contribution that they make. This I think requires a great amount of intuitive finesse, diplomacy and politically savvy.

Persons who are given the role of co-ordinating such distance learning interventions in places where the population is predominantly 'black' should, among other things, be willing to learn just as much as they are willing to teach and to continuously engage in careful introspection of their actions as educators and co-ordinators and their *raison d'être* for being involved in the particular project. First world educators should avoid presenting themselves as the 'great white hope' with all the knowledge and experience and as being benevolent by going to these less

developed countries to try and educate the 'less fortunate' people there. It is very easy to give such impressions without realising it.

Persons who are new to the programme itself should also make an extra effort to understand the multi-dimensional history of the programme in the host country, the provider institution and of course, the negotiations which played a key role in establishing and developing the programme. Linked to this is the identification of the major stakeholders and gatekeepers on both sides of the 'fence' and their role in establishing the programme. Then, there is the Identification of a group of key resource persons from both sides to ensure that there is a committed team that can provide support when it is needed.

It has been argued that there are two types of orientations which I believe exist along a continuum as universities seek to address the challenges of the 21st Century. There are the traditional institutional orientation and the emerging marketing orientation. Sometimes when traditional universities expand their offerings into the arena of distance education, they do so with little or no paradigm shift in their operational thinking. The main concerns are the needs and interests of the institution. They focus on teaching and seem to equate programmes on the same level regardless of location, students needs, and try to maintain the status quo.

There is minimal strategic planning to support these new types of programmes and when some new thinking does emerge, it is often stifled as it makes its way through the unchanging bureaucratic system. So whereas, the culture of the University Department may change through its interactions with other countries, the culture of the traditional institution itself remains fixed.

In this emerging marketing orientation, one would think that the priority would be given to the needs of the learner, since they are paying for a particular service. The institution should have an understanding of the prevailing social, political and economic environment in which the learning is designated to take place and so be able to modify programmes to accommodate the needs and interests of the learners.

The effects of globalisation could be positively used to forge strategic alliances with governmental and non-governmental organisations to maximise productivity within that country, maintain positive relationships and access potential students through the provision of quality services. There should also be a move to sponsor and engage in staff development for both the staff in the provider institution as well as in the host country. It should not be taken for granted that managing and teaching on distance education courses would be the same as teaching on

home-based courses. There are subtle and not so subtle differences and new staff should be inducted into the 'new' process.

While one can argue that the success of such programmes depend upon the personality of the person involved, I think that most people can be sensitised to the subtleties that exist on both sides and be provided with pointers which could provide invaluable briefs for new-comers. When attempts are made at providing educational support to small countries from a distance, there is a need to first identify the tensions that could or might exist between insider students and administrators and the outsider provider.

There are those who also fear that this medium of 'packaged learning' from a first world country, especially one which figured so prominently in their colonial past as another more subtle form of control towards eventual domination.

As is the specific case of Trinidad and Tobago, considering that the current collaborative relationship is between a non-governmental organisation (NGO) and an external university, one wonders how willing the government would be to totally accept the programme, especially since the NGO is the teachers' union which has undergone a long history

of various unresolved tensions with the various governments who have been in power.

Finally, there is a need to explore the continuing role of any University undertaking such a challenge - that is, its willingness to play an increasingly supportive role in facilitating change as the programme(s) enter(s) new dimensions. We need to critically consider the type of education which is being provided by distance education providers, to determine whether it is the type of education which Gramsci (1971) describes as "domination by consent". It is very easy for 'opportunities' of this type to be nothing more than a fast-food 'Kentucky-fried' type of education which would amount to another form of cultural imperialism or neo-colonialism and would merely continue the inequality between the coloniser and the colonised.

CHAPTER 4: Teacher Education in the British West Indian Colonies

Introduction

The West Indies refers to the former British West Indies and encompasses all the English-speaking territories in the region including Belize and Guyana which are part of the South-American landmass. These countries have a mixed and intricate history. Their societies all experienced some level of slavery, were colonised by different European nations and for the most part, their economies were dominated by a single export crop such as 'sugar'. It is important that Teacher Education in the British West Indian Colonies be contextualised in terms of this history; a careful study of which, suggests that education was introduced as an attempt at social control and was not really designed to allow the masses the freedom of thinking critically.

Educational philosophy, as influenced by John Locke, regarded the mind as a "tabula rasa" and capable of infinite enhancement. With this view, he felt that as good practice, children should be taught by teachers so that they could be imbued with the formation of good habits. Between 1696 - 1700, he was the most influential member of the Board of Trade in London, whose remit was in part to oversee the governance of the

colonies and the treatment of the poor in England. As a result Locke's influence, some educators reasoned that it would be wise to train the children of poor parents in England in regular religious worship towards the aim of moral improvement, handicrafts and agricultural skills and vocational arts so that they would remain contented with their station in life. The education offered then was not aimed at the improvement of their social condition, rather it was intended that they become good "hewers of wood and drawers of water" with a willing Christian spirit. (The Book of Joshua 9: Vs 21).

This religiously flavoured literary curriculum was adopted by the charity schools which were also present in the Caribbean and used for the education of the children of slaves and other poor inhabitants. London (1995:91) in his review of 'Policy and Practice in Education in the British West Indies' during the late colonial period concisely argued that:

... if internalization of humility, acceptance of , and compliance with, colonial policy can be taken as an objective of education under colonial rule, then ... the purpose for which the British planned the education system in their West Indian colonies was largely accomplished.

The major social, economic and political events which took place between 1846 and 1895 affected not only the social structure of the British West Indian Colonies but also the education which was provided.

In the West Indies, race, wealth, social status, and religious and cultural connections were mutually reinforcing. Wealth and high social standing tended to belong to those who were either white or who had white progenitors ... comparatively few people of pure African origin could be numbered among the so-called "respectable" classes. In the West Indies respectability implied a European cultural affinity, a level of education, a manner of speech and a certain approach to religious or spiritual concerns.

(Green, 1976: 392 - 393)

As such, this chapter begins with a brief overview of slavery and indentureship and their link with the sugar industry. It continues with a broad overview of the history of education and teacher education in the British West Indies with some focus on Trinidad and Tobago, because of the particular significance of that country to this dissertation. It will be shown that though the provision of education and its administration was different from country to country, there were certain policies which were common and these had a resounding effect on the future development of education in the Caribbean. The British Colonies of the West Indies evolved based on the projected plans in the minds of the colonizers and the attendant effect was akin to 'playing with the minds' of those who were being colonised.

Slavery, Sugar & Indentureship

Until the late eighteenth century most people in England - or France, or Holland, or Portugal - accepted without question the necessity of slavery and of the slave trade. ... The slave trade, because it made large profits, supplied essential labour, and employed many ships, was necessary, just as child labour or the press-gang were necessary.

(Parry & Sherlock, 1956:175)

Europeans imported several million African slaves into the countries of the Caribbean and the Americas between the sixteenth and nineteenth centuries, forcibly subjecting them to one of the harshest and most regimented labour systems ever conceived. Though millions of slaves died in the Middle Passage, several million survived and they constituted approximately four-fifths of the region's population. Hamshere (1972:126) in an attempt to account for the number of slaves that crossed the Middle Passage for the West Indian colonies says:

It has been calculated that in the years between 1680 and 1786 more than two million Africans were shipped across the Atlantic and sold as slaves in the West Indian colonies.

This estimate was also given by (Pitman, 1917: 67) and further highlighted by Williams (1970: 145) in the following adapted Table 4.1 prepared with the statistics which were available:

Table 4.1 Importation of Slaves to the West Indies

Years	Colony	Importation of Slaves	Average Importation per year
1700 - 1786	Jamaica	610,000	7,000
1708 - 1735 & 1747 - 1766	Barbados	148,821	3,100
1680 - 1776	Saint - Dominique	800,000	8,247
1720 - 1729	Antigua	12, 278	1,362
1721 - 1730	St. Kitts	10,358	1,035
1721 - 1729	Montserrat	3,210	357
1721 - 1726	Nevis	1,267	253
1767 - 1773	Dominica	19,194	2,742
1763 - 1789	Cuba	30,875	1,143
1700 - 1754	Danish Islands	11,750	214
Total		1,647,753	

Williams (1970:144) who felt that, "The Negro slave trade in the eighteenth century constituted one of the greatest migrations in recorded history" further explained that:

....Average annual importations do not provide a complete picture... the frightful mortality of the slaves on the plantations made annual increments essential. In 1770 and 1771 the mortality was so high that the importation in those years, heavy though it was, was not adequate to supply the deficit. Half the population had had to be renewed in eight years.

Williams (1970: 145/6)

The slave trade, which dwindled in the 1840s and ceased altogether in the mid-1860s, was by the 1890s a fading memory. More significantly, slavery had been declared illegal across the entire region, the last of the

psychic scars of slavery was indelibly marked in the former slave population and the concept of the plantation economy established. This was, in the words of Beckford(1972: 3):

[a]n instrument of political colonization; it brought capital, enterprise, and management to create economic structures which have remained basically the same; it brought together different races of people from various parts of the world to labor in its service and thus determined the population and social structures now existing in these places.

The economic structures were geared toward the extraction of a maximum amount of labour from the largest possible number of involuntary migrants from Africa for the least amount of input (food, clothing, shelter). Maximum production primarily for economic gain was its principal aim.

Several events in recorded history demonstrate that the imperial state had been the prime agent in the institutionalisation of racial domination by European colonisers. This domination was played out at varying levels of the administration: the monarchy, the lobbyists and monopolists of the budding mercantile enterprise and the colonists. At the local level, the colonial state becomes the most important instrument of racial domination because it was the machinery which was required to maintain and regulate the industrial system which was built on the

expropriation of labour from non-European labourers by European managers. This served to enforce the racial policies which governed the colonial society. As Singh (1994: xiii-xiv) pointed out in his reflections:

...the historical experiences of American and Caribbean societies from the time of Columbus' voyages of discovery has been one of racial conquest of non-Europeans by Europeans and, wherever the indigenous peoples were not practically exterminated, the subsequent institutionalization of White domination ... over native or imported non-White races ... Here the ruling class was also the ruling race.

Slave labour which was relatively inexpensive and exploited to maximum capacity was the cornerstone of 'the triangular trade' - the multifaceted branch of overseas commerce of the most profitable colonial mercantilist enterprise in the world.

The Act of Emancipation which was passed by the British Government On August 1, 1834 freed nearly three-quarters of a million people from slavery and made them apprentices to their former masters (Augier et al, 1960:171). As recorded by Hamshere (1972: 148) the day:

... passed without violence in any of the colonies. For this considerable achievement the missionaries' influence was largely responsible, as the day was marked by thanksgiving services in all the churches. ... Only in Trinidad was there rowdyism, but Sir George Hill, the governor, refused to declare martial law and no violence occurred.

Though this must have been an event that was welcomed by the slaves, the Act, as it was translated, seemed to be masked freedom in 'fancy dress' because it was very limited in practice as the former slaves were required to provide free labour for forty hours per week.

The abolition of slavery resulted in the introduction of indentured labourers from the Indian sub-continent and China to replenish the declining labour force of the sugarcane plantations. This led to a stratified society based on race, colour and caste (Bacchus, 1994:1).

Following this, the cane sugar industry of the British West Indian Colonies experienced a steady decline between 1850 and 1895 because the British Government withdrew their preferential treatment of purchasing sugar exclusively from them and began purchasing beet sugar at a lower rate from Europe. Thus, the economies of the colonies were in a state of crisis because their principal imports cost more than their local exports (Bacchus, 1994: 2 - 3).

Funding Education in the British West Indian Colonies

Long before Mico College was founded, the missionary societies, led by the Moravians, had attempted to provide education for the slaves,

but the long estate hours ... left no time for schooling except at night and on Sundays, where the only subjects allowed on religious principle were Bible study and catechism. At least this taught some to read.

(Hamshere, 1972: 154)

Prior to the Emancipation of 1834, religious missionaries who were Anglicans or English Catholics, Moravians, Baptists and Methodists sought to provide some modicum of educational provision for the slave population in the Anglophone Caribbean. The Roman Catholics presence was more visible in countries like Trinidad and St. Lucia where there were previous Spanish and/ or French colonisation (Cobley, 2000:2).

In preparing for the Act of Emancipation, the British Government passed several resolutions in June 1833 which became law three months later. The 5th resolution of the House of Commons was directly related to the education of the slaves and stated:

That His Majesty be enabled to defray and such expense as he may incur ... in providing upon liberal and comprehensive principles for the religious and moral Education of the Negro population to be emancipated.

(Gordon, 1968:11; 1963:1)

A grant of £30,000 was dedicated to the education of the 'negro' population (the Negro Education Grant) was established in 1834 through an abstraction from the British Parliament by the abolitionists.

While the British Government was deciding who should administer this grant, the missionary societies, funded by the British congregations proceeded to set up their own system and provide religious / elementary education in an effort to eradicate the effects of slavery. The intention was to fund the teaching of the Christian religion to the ex-slaves by missionaries because it would build upon their former work in the education of slaves in the colonies. Their mission would be to get the newly emancipated slaves to willingly accept their lowly position in life through the vehicle of religious and elementary education. This was the weapon that emancipated the minds of some and further enslaved the minds of others.

Interestingly, this was concurrent with the British Government's decision to begin subsidising the school societies in Britain in order to manage elementary schools there. Since all patterns of behaviour and official policies came from Britain, one could question whether the intention at that time was not to model in the colonies "... the high ideals of the colonial imagination" (Bhabha, 1994:85).

After 5 years of funding, the Negro Education Grant diminished and was terminated in 1845. During this time there was also a parallel reduction in the financial assistance provided for education by the missionary societies

(Hamshere, 1972: 153; Augier et al, 1960: 178-9). By this time, primary education had been firmly established in all the colonies. However, with this reduction in financial support parents were expected to pay an increasing share of their children's education.

Colonisation and Deculturation

In the initial stages, this privilege of having access to education was not extended to the children of the indentured labourers. Little or no provision was made for them. Bacchus (1994: 6) suggests that as greater accommodations were made for these children in the education system, it was perceived that the education was aimed at deculturising them. They were expected to denounce their previous religious beliefs as Hindus and Moslems and embrace the religion of the new world, Christianity. My understanding of this is that deculturation and religious indoctrination were experienced by all the indigenous peoples of the Caribbean as well as by all who came as slaves or indentured labourers because they all had cultures and religious practices which they practised before the invasion of Europe. In fact, I would argue that the deculturing process continues today through the active use of the media to sell instant westernised practices, patterns of behaviour, products and services - ranging from foods, religion, clothes, music and so on.

Carnoy (1972:15) critiques the “colonizing aspect of schooling” by suggesting that Western schools were used to prepare indigenous elites to serve as “intermediaries between metropolis merchants and plantation labor”. His argument continues by proposing that by incorporating these indigenous peoples into the production process of goods for the ready markets of the metropole, they would be better able to understand the social structures and nuances of the European and so better suit the purposes of the colonial masters.

Carnoy (ibid:13) identifies the on-going colonising function of education when it occurs according to Western tradition and suggests that it continues to transmit:

... the social and economic structure from generation to generation through pupils selection, defining culture and rules, and teaching certain cognitive skills.

Post 1834, the black, recently emancipated, population was not considered to be part of this grooming exercise. What was required for them, was schooling which would instil:

... a world view that would develop in them a voluntary subservience to the white ruling groups and a willingness to continue occupying their positions on the lowest rungs of the occupational and social ladder.

(Bacchus, 1994:308)

Gordon Lewis (1968:28) in his analysis of the situation, remarked that by trying to convert the West Indian person into a "coloured English gentleman" through the process of education actually disenfranchised them and robbed them of their true cultural heritage. They became, as he put it, "culturally disinherited", through a process which Bhabha (1994) refers to as "colonial mimicry". In the dialect of the region one would be described as "tryin' to be more white dan de white man".

John Sterling, a priest who was appointed as a special commissioner, wrote a report on education in 1835 about this region which was based on reports from the religious bodies. He was able to compare the education provided in the colonies with what was provided at home in Britain. Though he openly criticised the education which was provided by these religious volunteers, he acknowledged that using the services of the proselytising bodies was perhaps economically necessary.

He remarked that the situation in the West Indies seemed to be an aggravated version of the same inadequacies found within the education system in Britain namely; large class sizes, poorly trained and untrained teachers, dilapidated buildings and overuse of the rote method of teaching. Pupils were indeed required to memorise and regurgitate information which was not in the least bit relevant to their situation. This

information however, offered to some extent a chance of social mobility and respect in the eyes of the community. The former slaves perceived education as a window of opportunity where their offspring could learn to read and therefore be able to eventually rise out of their position as labourers. As a result, a number of new schools were provided with the help of apprenticed labour (Hamshere, 1972: 153; Augier et al, 1960: 178-9; Gordon, 1968:59-66).

Islands which had a strong Catholic influence were discriminated against because the British Government was decidedly Protestant and averse to Catholicism probably because it was the religion of their rivals Spain and France. As such, countries such as Trinidad, St. Lucia and Grenada experienced a slow educational start.

The Administration of Education

Whitehead (1981: 75) identified that “a fundamental feature of colonial education was the free scope given to private or voluntary enterprise” which was coined as ‘voluntaryism’ by Mayhew (1938: 44). This was ‘a fundamental feature of English [educational] policy at all times and in all places’. Though this strategy was clearly perceived by the British Government as one of financial expediency, it was also perceived as a

means of controlling the perceived 'barbarism and lawlessness' of the ex-slaves by providing them with moral education.

As a representative of the British Government, C.J. Latrobe in his report, questioned the 'wisdom' or 'kindness' of providing education to the black masses after his inspection of West Indian Schools between 1837 - 38. He felt that the masses would misinterpret the objective of the education provided and would not realise that it was meant to subdue them into accepting their fate by following in their parents footsteps and providing labour for the sugar plantations and/or farms.

Industrial Education

As a result of Latrobe's views, the British government advised that education should be fashioned in a manner which would assist the masses in becoming 'animated' so that they would patiently persevere to work hard with no complaint (Bacchus, 1994: 121). The aim was to provide a kind of education which would contribute dedicated service towards the economic development of the colonies. With that in mind, in 1847, they provided a system of industrial education which was designed by James Kay Shuttleworth, a well known English educator, who felt that the following objectives should be addressed:

- **The moral development of the black population** - this promoted the influence of Christianity;
- **The improvement of the general standard of living among the black population** - they were taught health education, how to economise and live within their means, the rudiments of cottage gardening and the production of handicrafts.
- **The development of social skills and political awareness** - they were taught English as their prime language of communication and the importance of Britain as the mother-country as well as the “domestic and social duties of the coloured races”.

(Bacchus, 1994: 122 - 4)

In order to achieve the objectives he proposed 3 types of schools, namely; *Day Schools of Industry*, *Model Farm Schools* and *Normal School of Industry*. **Day Schools of Industry** were supposed to combine academic and practical training which would have been geared to keeping the students ‘chained’ to the fields. **Model Farm Schools** were a bit more advanced and the students would have been taught agriculture from a scientific perspective, basic construction skills. Mathematics which emphasised weights and measurement which were necessary for the cultivation of the gardens. **The Normal Schools of Industry** were designed to prepare only

the very best industrial education teachers for these proposed schools. The curriculum would have covered an extension of what would have been taught at the Day school and the Model Farm school as well as Social Studies (English History and Geography); Aesthetics (Vocal Music); and Professional Subjects (The Art of Organising and Conducting an Elementary School) (Bacchus 1994: 124 - 5).

Education for the Preservation of Social Order

In 1845, in Trinidad, a subsidy of £1,418 was granted for elementary education and the various denominational bodies were free to establish schools wherever they pleased and teach whatever they thought was appropriate. It was common practice in the region that though the funds were allocated for school maintenance and teachers' salaries, the government had "... no control over the quality of the education offered or the qualifications of the teachers" (Bacchus, 1994:34).

By 1850, the governor of British Guiana (now called Guyana) established a Board of Education and the first school inspector was appointed in 1851. He linked education to crime management and reduction and argued that increased expenditure on the part of the government in the area of education would have the desired result of encouraging virtue and

removing ignorance thus reducing expenditure in areas such as repression and punishment of crime (Bacchus, 1994: 36).

By 1870, there was a change to crown colony government in most of the colonies, meaning that planters were not able to exercise constitutional power as had previously been the case. In this situation, the colonial governor had “more direct responsibility for all local legislation ... including those dealing with education” (Bacchus, 1994: 9). In his capacity, he was implementing the ultimate will of the British Minister of the Crown.

Those who were engaged in the provision and/or financing of education in the British Colonies “attached the greatest importance to the religious and industrial education of the masses” (Bacchus, 1994: 148). Great emphasis was placed on suggesting that it was not the intention of mass education to “raise the [students] above their station and business in life ... but to ... fit them for that business” (Green, 1976). Religious education was perceived as “a noble device for uplifting the human spirit, controlling passion and preserving the prevailing social order” (Green, 1976).

Mico's Contribution to Teacher Education

At the time of emancipation, the Mico Trust a religious but non-sectarian society had accumulated £120,000 through investments and an appeal was made to the British Government to sanction the spending of these funds for the provision of educational opportunities. As a result of this, three training colleges were established between 1835 to 1836 in Jamaica, Trinidad and Demerara as well as several primary schools which offered a higher quality of education than other schools in the region (Bacchus, 1994: 71; Gordon, 1968: 40; Augier et al, 1960: 179-80).

From the onset, the Mico establishment itself was plagued with a series of challenges. Though they had limited funding, they were not supportive of other denominations establishing their own teacher training centres. The other religious denominations, mostly the Roman Catholics and those from the Church of England (Anglicans) perceiving the Mico establishment to be semi-governmental and protestant, felt excluded and did not make full use of the available facilities (Campbell, 1996: 57). It would seem that subtle religious discrimination was rearing its head even in the attempt at formal teacher training.

Because of the religious rivalry, there was a shortage of suitable candidates. Also, the course did not seem to have a prescribed length but

was dependant on the whims and fancies of the Mico Superintendent or the clerical sponsors. The length of their stay at the training institution varied from a few weeks to two years and there was no final examination. It is important to note that during this period teacher training had only been recently initiated in England and this was to have serious implication for the colonies because it was an entirely new venture for which they had very limited experience. For example, the institution was not accustomed to training child monitors to be teachers and the teachers that they trained in England, though young, were adults.

The local recruits did not possess a sound general education on which to build a foundation so there must have been a struggle for both the staff and the students. The staff focussed on professional expertise, and the students needed support in areas of the curriculum. When the Negro Education grant was terminated in 1845, the Mico Trust closed all its teacher training institutions except those in Antigua which was subsequently closed in 1890 and Jamaica which is the only one which has a continuous history.

These closures were a further blow to Teacher Training which continued to receive little attention despite numerous requests to the local legislatures (Bacchus, 1994: 71; Gordon, 1968: 40; Augier et al, 1960: 179-

80). It is not surprising therefore that at the point of their financial collapse in 1845, Mico had only been able to qualify approximately 20 teachers (Campbell, 1996:57/58). This was a clear indication that the churches could not provide sufficient teacher training opportunities for potential teachers, in the same way that they were unable to provide sufficient schools for the children of the West Indies and in order to deal with the requests for trained teachers, the governments of the region initiated the pupil-teacher system (Campbell, 1996: 57/58; Bacchus, 1994: 199).

The Establishment of Teacher Training Colleges

No Respect for the Profession

Shirley Gordon, a former Professor of Education at the University of Guyana commenting on the teaching profession in her review of education in the West Indies from 1833 to 1933, stated that:

[t]here has never been a trained teaching profession in the West Indies. Salaries have always been modest and, in bad times, wholly inadequate. Nevertheless, although the standard of teaching has been consistently criticised, there has seldom been a complaint of a shortage of teachers. The occupation has attracted the number of people, though often not the desired ones, who could be paid from the limited funds available.

(Gordon, 1963: 166)

As far back as 1835, the Rev John Sterling in his report recommended that “improving the Masters” would be necessary in order to transform the education in the West Indies and that “a Normal or Teachers’ School” be established in each of the two Dioceses.” [Jamaica and Barbados] (Gordon, 1968: 38 / 39 /65)

After 1845, teachers in the British West Indies continued to have a poor moral, social and intellectual standing and this continued in the second half of the 19th Century (Cork,1845: 209; Gordon, 1963: 178). Rev. Cork of the Church Missionary society remarked that most other occupational groups (clergy, the police and immigration officers) including the gaol-keepers had “ a suitable provision and an honourable rank in society.” The same he concluded, could not be said of teachers. He observed that the governments had treated teachers without care and consideration and the general populace showed little respect for them and the profession. He cautioned people against pursuing that occupation if those debilitating conditions persisted (Cork,1845: 209; Campbell, 1963:273 - 274; Bacchus,1994: 199).

In 1847, though the Governor of the Windward Islands commented that the low levels of academic achievement in the islands was due to the “.. poorly qualified and inadequately equipped teachers”, it was still

expected that teaching would be conducted with the highest degree of professionalism, that is with effectiveness and efficiency (Bacchus,1994: 164). No consideration was given to the ill-equipped classrooms, the absence of appropriate teaching materials, the dilapidated buildings or the lack of teacher training.

It was evident that teacher education was not held in high regard since very limited support was given by most of the legislative bodies of the colonial governments. For example, when new normal schools were established, no teacher training support was provided. In addition, the salaries accorded were inadequate and so the profession could not attract a high calibre of staff and the teaching conditions were described by Bacchus (1994: 173) as "... unsuitable with limited and often irrelevant instructional materials." This sub-standard scenario set the teachers up for failure.

By 1848, Governor Harris was remarking on the "poor moral and intellectual qualifications" of several of the local teachers. In his report of 1851, he indicated that this "scarcity of efficient teachers" was responsible for the poor state of education in the country and recommended the establishment of a teachers' training college (Bacchus, 1994:179).

In Trinidad the Mico Normal School operated for 9 years before the collapse. Following this, for a period of 6 years (1845 - 1851) there was no teacher training provision on the island. During that period, there were few schools especially for the black population, so there was no real crisis in relation to the supply of teachers since staff from Europe was brought in to supplement the already existing missionaries and local teachers in the schools. A formal government teacher training facility was later established in 1852 in Woodbrook which is on the periphery of the capital of Port of Spain (Campbell, 1996:57-58). This was a male institution and it was not until four years later in 1856 that a facility for training female teachers was established.

In Trinidad, "... some temporary masters came from among those individuals who were shoemakers, house servants and others who had difficulties finding jobs elsewhere" (Bacchus, 1994: 190). Coloured folks who aspired to teaching established their own private school so that they could enjoy greater prestige than those who taught in state-assisted schools.

Some colonies like St. Lucia had to depend on teacher training institutions on other islands for the supply of trained teachers because of the closure of the normal school there. They also experienced difficulties recruiting

good quality schoolmasters because of the lack of training facilities.

Teachers' Certificate Examinations

Some of the model schools in the colonies had developed into better primary schools and so, an attempt was made to recruit outstanding students from those schools to become monitors and eventually pupil-teachers. In the selection process, the heaviest weighting was given to the candidates' moral and religious background, then their general level of education followed by any training which they may have received. The latter criteria was largely ignored because there was little opportunity for such to be provided (Bacchus, 1994:189).

Some of these eventually became untrained teachers and teacher trainees within the education system. This was the genesis of the pupil-teacher system which replaced the largely unpaid monitorial system. Students who were on their way to becoming teachers were able to acquire some practical training.

In 1866, the Education Commission recognising that there was a dire need to improve the supply of teachers and to have them better qualified recommended that an external Teachers' Certificate Examinations be introduced as was the case in some of the other colonies like Barbados

and Jamaica. Teachers were required to study on their own for such examinations. However, in some cases, in-service courses were conducted covering areas such as methodology, management of schools and some academic subjects to support the teacher in improving his knowledge base as well as his practical teaching skills. Gordon (1963: 167) deduced that the courses as well as the examinations tended to be very pedantic and because there was very little understanding of the subject matter on the part of the teacher-in-training, rote learning was recommended because it allowed for regurgitation of what was considered important information.

Though training programmes differed among colonies, with some being more ambitious than others, the general levels to be attained were first class, second class and third class. Third class teachers would know the rudimentary skills of reading, writing, spelling as well as the application of the four arithmetic rules of addition, subtraction, multiplication and division in both their simple and complex forms. The second class teachers would be able to parse a sentence, be able to apply higher level arithmetic rules for sums based on reductions and proportions, have a working knowledge of weights and measurements and some basic knowledge of history and geography (Bacchus,1994: 189).

The first class teacher was expected to be the graduate of a teacher training institution, and function at the level of a second class teacher with the added capabilities of doing mental arithmetic, writing short essays using roots, suffixes and prefixes, competencies in geometry and book-keeping for male teachers, needlecraft for female teachers. The teachers' marketability was increased if they were able to teach singing by reading music notes (Bacchus,1994: 189). Based on the records of Bacchus (1994: 199) "[t]his lasted the next three-quarters of a century" that is, until the early 1900s.

Attempts at Educational Reform in the Early 1900s

The Teachers Associations were beginning to emerge and presented themselves as respectable bodies within the Region around that time. In 1919, the Trinidad and Tobago Teachers Union (TTTU) was formed in Trinidad and they advocated for improved working conditions and better salaries for teachers. By the 1920s, teachers were not united under one association because of the factions of teachers which existed under the dual system of education. There were teachers who were employed in the government schools and teachers who were employed in the denominational schools. However, the members of the TTTU had become more vociferous and were making several representations to the government about the modernisation and reform of the curriculum

(Campbell, 1992: 40;1996: 169). They penned their grievances and dissatisfaction about the education system and the Director of Education, Capt. J. Cutteridge, in the *Teachers Journal* and later in the *Teachers Herald* (Ibid.1996:193). Cutteridge had published a series of reading books based on local topics and Afro-Trinidadian folk tales. They felt that it lacked sensitivity and respect for the locals and was regarded with suspicion and greeted with opposition. Admittedly, it was the first real attempt to Carribeanise the curriculum and make it more meaningful for the population.

Frederick Marriott, the English Director of Education for Trinidad with Mayhew, the expert reformer from the Colonial Office, produced an Education Report in 1933 on education in the Eastern Caribbean. Their views supported the view put forward from the Conference of Education Officers in Trinidad in 1921 to provide a Central Training College for the West Indian region which they felt would improve the standard of education in the colonies. Unfortunately, there were very few West Indians at that conference and as Gordon (1963:111) explained:

...it could be suggested that it was a case of the wrong people proposing the right measures... Since these people [Mayhew and Marriot], rightly or wrongly, were held to be responsible for the sorry plight of West Indian education, few West Indian leaders were ready to support the suggestions of English officials.

The 1930s was a time of economic depression for England and therefore the West Indies. There were insufficient funds for basic maintenance of the school system so it would have been impractical to believe that any educational reform could have been achieved under those circumstances. Some input was made into education after 1935 when a loan was raised for educational purposes (Gordon, 1963; Campbell, 1992).

Prior to the Marriott-Mayhew Report, educational planning was devoid of any attempt to address or even identify the critical circumstances which affect peoples day-to-day lives. Just as areas such as "... poverty, unemployment, malnutrition, infantile mortality, inter-racial misunderstanding or emigration" were never before addressed within an educational context, irrelevance of the curriculum was never an issue (Gordon, 1963:7).

Prior to this, parents who were well off preferred to send their children to institutions of higher learning in the metropole. The white settlers who had intentions of returning to England felt that if their children were exposed to the education there, they would be better able to fit into the British society when the family returned. Secondary education had not been fully developed in the West Indies, so many local students were unable to obtain the required qualification for direct entry into foreign

universities, especially those held in high esteem like Oxford and Cambridge (Bacchus, 1994: 250).

The education of teachers is one area in which the practices of the Caribbean Islands are both similar and different. By the 1970s there were three main ways of preparing teachers for the education system: the two year Teachers' College programmes; the pupil-teacher arrangement ,which was a legacy from the colonial days; and, through courses run by the University of the West Indies. Mico, that legacy from the past, remained as the leading Teachers' College in Jamaica and became a co-educational institution (Figueroa, 1971: 126).

In the 1970s the Colleges in Trinidad and Tobago required candidates to have at least 5 passes at General Certificate of Education (GCE) Ordinary Level. Having Advanced Level passes would have been a bonus. In Jamaica, candidates were required to have a 'School Leaving Certificate' with passes in 5 subjects. Later on, they were required to have 3 Ordinary Level passes (Figueroa, 1971: 128/9). During that period, countries in the Northern Caribbean had similar entry requirements to those in Jamaica, while the countries of the Eastern Caribbean had a standard which was similar to that found in Trinidad.

Tertiary Education for Teachers

Early Developments and Recommendations

The Colonies of the British West Indies were off to a slow start in the development of tertiary education, with the first institution being established more than 200 years after schools were developed and approximately 200 - 300 years after the colonies of North America and Spain had established institutions of higher education (Miller, 1998: 100).

Cobley (2000:2) in his review of historical developments in the anglophone Caribbean also concluded that “[w]estern concepts of education brought to the region by Europeans ... tended to be religious in inspiration.” The conviction of this perception is borne out by the conversion of Codrington Grammar School of Barbados which was established in 1745 to Codrington College in 1829 as the first tertiary level institution in the Commonwealth Caribbean, set up to train Anglican priests (Cobley 2000:2 ; Miller, 1998: 100). Later in 1831, the Moravian Normal School for training Brown Ladies was established in Jamaica as the first teachers’ college. Unfortunately it was short-lived and closed its doors in 1839 (Miller, 1997:61; The Joint Board of Teacher Education: undated, online).

Patrick Keenan, the Chief of Inspection of the Board of National

Education in Ireland was commissioned by the British Government to advise on the special problems being experienced in Trinidad. After conducting his research, he produced a Report in 1869 which addressed the quality of education which was being offered and its relevance to the society (Gordon, 1968: 3-4). With regard to higher education, he made several important recommendations. Keenan recognised that the salaries of teachers were unattractive if the government wanted to attract persons of a higher calibre to the profession. While some teachers eventually became very efficient in spite of the fact that they came through the pupil-teacher system, the majority of them were disadvantaged because of poor training (Bacchus, 1996: 181).

The recommendation was made for the model school to be discontinued because the recruits were entering the profession with "qualifications of the humblest character" and the training was inadequate. The Teachers' Certificate Examination was introduced in the 1870s and teachers in Trinidad were required to pass this in order to be qualified. In the 1890s denominational bodies were permitted to establish their own Teachers' Colleges and the Presbyterians and the Roman Catholics took up the offer (Bacchus, 1996: 181/2).

The University of the West Indies

In his Report, Keenan documented the need for an institution of higher learning which could support the needs of the West Indies region but that it should not participate in any teaching but be purely an examining body. The preferred location could be in anyone of the three larger islands: Trinidad, Barbados or Jamaica, because it would almost guarantee cost-effectiveness because of the size of the 'white population' resident there (Bacchus, 1996: 248).

Though several reports which followed the Marriott-Mayhew Report recommended the establishment of a regional university, it was not until 1948 that the University College of the West Indies (UCWI) opened its doors with its first faculty being Medicine. At that time, the establishment of UWI was probably both a political statement and a product of colonial ideologies. The institution struggled through many periods of economic hardship and limited resources to be a centre of excellence within the region. Being in the Caribbean, it has also been plagued by natural disasters such as hurricanes.

At its inception, the University enjoyed a special relationship with the University of London and the first set of degrees which were granted were those of the latter. It was not until 1952, that a professor of

education was appointed and the Department of Education was established in 1953. The work focussed on three main areas:

- (1) professional training for existing or prospective secondary school teachers leading to the Diploma in Education;
- (2) research on educational problems in the Caribbean; and,
- (3) various types of services, advice, and consultation on educational matters at all levels to Governments, educational institutions, and teachers of the area.

(Hauch, 1960: 91)

In 1960, Trinidad was the second island on which a campus was established and UCWI was accorded full university status with full degree granting capabilities in 1962. Soon after a third campus was opened in Barbados in 1963. At present, the University of the West Indies is one of two Regional Universities in the World and continues to operate from those three campuses and is funded by fifteen English-speaking Caribbean countries (Marrett, 1989: online; UWI, 1997: on-line; Dirr, 1999 :online).

As the anglophone Caribbean States became politically independent, they made special efforts to establish national or community colleges to cater to the training needs of their growing population. Teacher training was included in this reform.

In 1982, the University of the West Indies Distance Teaching Experiment

was established, as the name implies, "... as an experiment in how technology of teleconferencing could be used to span regional geographic barriers and take the classroom to remote locations" (UWI Strategic Plan, 1996 - 2001:9). In 1992, the University decided to expand this limited distance teaching programme and engage in a transformation process which saw the birth of the Distance Education Centre (UWIDEC), four years later. This effectively transformed the institution from a single mode to a dual mode institution in the process, with facilities in each of the three campuses. There are also Distance Education Centres in all of the fifteen non-campus Caribbean countries which support the University. Among the courses that are offered are: Certificates in Adult Education, Education, Educational Management and Supervision; and Certificates in Education for Teachers of Literacy Studies, Mathematics, Social Studies.

Many achievements have been made with regard to tertiary level education in the Caribbean through the efforts of the University of the West Indies. Though the non-campus countries account for at least 22 percent of the region's population, only 7 percent of the registered population of the university are from those regions. The Office of the Board for Undergraduate Studies (OBUS, 1999: 5-6) recognising the unlimited potential of distance education provision in the islands, has

described UWIDEC as the “ window of opportunity for many mature adults who want to achieve a higher education degree”. In this light, the University should take up the challenge of providing greater access for persons from these non-campus countries through supporting an adequately resourced expansion of their distance education provision.

CHAPTER 5: Methodology & Methodological Approaches

Areas of Focus

Burgess (1984:2) explains that "...research is no longer viewed as a linear model". Rather it is now perceived "...as a social process." He goes on further to explain that:

'methodology' involves a consideration of research design, data collection, data analysis, and theorising together with the social, ethical and political concerns of the social researcher. Accordingly, questions now need to be raised about the actual problems that confront researchers in the course of their investigations and some consideration needs to be given to the ways in which techniques, theories and processes are developed by the researcher in relation to the experience of collecting, analyzing and reporting data.

(Burgess, 1984:2)

This study has its own sets of peculiarities because, in this case, the researcher has worn many hats, moving through many levels in the development of the project - first as an advocate, student, administrator, local tutor, course-director, lecturer, evaluator, researcher. Some of the people whom I have interviewed have been my fellow students and work colleagues; others have been senior administrators whose decisions have significantly affected the development of the programme. My intricate

involvement with the programme at different levels ensured that I too, had just as much of a story to tell about the events that took place between 1987 and the present time, as did the stakeholders whom I interviewed. I found that I could not escape from myself in this thesis nor did I want to and aspects of this thesis are therefore understandably autoethnographical in nature.

I discovered through my engagement with the research that communication and interpretations were multi-layered, and so, 'patches' of the thesis are dominated by my voice trying to interpret the fragmented statements of the other stakeholders while at other times, the representations of the others seem to set the stage for the construction of an identity for myself. Ellis and Bochner (2000:739) put forward the view that autoethnography:

...displays multiple layers of consciousness,
connecting the personal to the cultural.

This research has provided spaces for the voices of others to be heard as well as a space where I could deal with the complexity of the research as a border crosser. It provided a pathway along which I could re-connect and re-interpret my original culture while re-searching or looking again at the world to create 'new knowledge'. I was able through this process of re-search to mediate some of the experiences through my eyes. This was

particularly important for me because while writing up the research I found that 'I' kept changing as I delved deeper and deeper into the research. I felt as though my identity was moving along several points of a continuum. There was 'I' the Caribbean person who played many roles in the Caribbean, 'I' the Caribbean person writing bits about the emotional experience from a personal - Caribbean Perspective, 'I' the Lecturer at the University at Sheffield and 'I' the Programme Director at the University of Sheffield. When the 'I' changed to 'we', it became even more confusing because, I had to keep reflecting upon which 'we' I was referring to because of the many groups to which I belonged. Rather than being a dialectic engagement with theory and practice, the research had become a multi-lectic experience where there were several spaces for reflection and engagement at varying levels.

Ellis and Bochner (2000:740) further clarifies the process involved in ethnography by explaining that:

Although reflexive ethnographies primarily focus on a culture or sub-culture, authors use their own experiences in the culture reflexively to bend back on self and look more deeply at self-other interactions. In native ethnographies, researchers who are natives of cultures that have been marginalized or exoticized by others write about and interpret their own cultures for others.

I hope that the personal interjections will provide insights and understanding for the readers who will undoubtedly make validity and value determinations.

One of the interesting things about conducting this type of research in a small Caribbean island is that everyone involved plays a multiplicity of roles over any given period of time and added to this, every one knows every one else so there is a strong inter-connectedness in all of this. As Louisy (1997:202) states:

... small societies grow up within interdependent networks where the same individuals figure many times. Social relationships are therefore multicomplex: there is a coincidence of overlapping of roles, in which individuals are tied to each other in many ways.

In this research, an attempt is made to understand the present culture as well as the historical culture of Trinidad specifically and the Caribbean in general and the way in which meanings have changed overtime. It has been important to maintain a continuous thread of social interactions with key stakeholders throughout the data gathering process because each person who has been involved in the teacher professional development project thus far has his/her own interpretations of the world and would therefore have contributed varying flavours of meaning towards the great melting pot of collected data. It is therefore important that as far as

possible, the various realities which were and are being experienced are contextualised. This is an attempt to develop theories of educational practice suited to educators in the Caribbean based on an interpretative, emancipatory and hopefully illuminative approaches to data collection and analysis.

Research in the Developing World

Shaeffer (1986:5) noted that:

(i)n much of the developing world, educational research is largely empirical and quantitative, characterised by the development of standardized tests and questionnaires, the production of data from large samples of school and individuals, and the analysis of these data by a variety of statistical methods.

Sadly, this sort of study rarely addresses the sorts of issues that are relevant in policy making, the realities faced by teachers and points at which the educational policies are in harmony or are discordant with the practices of education (Vulliamy, Lewin and Stephens, 1990:17). It has been the custom to reproduce 'fancy tables' from international funding agencies that collect their data from fact-finding visits and are rarely able to scratch below the surface of what appears to be reality. The data collected is usually sterile quantitative data which is used to paint an

acerbic picture of the situation and does not address the real nature of the problem. As such, little is understood about the very nature of practice of education in countries like those in the Caribbean.

It has been noted in the Trinidad and Tobago Education Policy Paper 1993 - 2003 (Item 2:11:1) that research has been a largely neglected area in terms of educational decision-making and development. There has not been a developed culture of recording data over the years, coupled with insufficient government allocations of funds to establish research centres or if they are established, they are not provided with qualified staff and or finance to adequately train personnel. This practice suggests that decisions on administration and policy making are conducted in a vacuum in the absence of any relevant data. Certainly, it makes one think of whether research as a national agenda is deliberately given a low priority so that there is less of a 'threat to established policies' (Vulliamy, Lewin and Stephens, 1990:22).

One also wonders for which audience the policies were developed and written. Are they largely developed to satisfy the requirements of the international funding agencies who are easily able to laud it over the bureaucrats of the Ministry of Education with their quantitative indicators and other forms of de-contextualised data.

Parlett and Hamilton (1977:10) in describing an alternative approach to evaluating educational innovations argue that:

[The] primary concern [of illuminative evaluation] is with description and interpretation rather than measurement and prediction... The aims ... are to study the innovatory programme: how it operates; how it is influenced by the various [educational] situations in which it is applied; what those directly concerned regard as its advantages and disadvantages; and how students' intellectual tasks and academic experiences are most affected. It aims to document what it is like to be participating in the scheme, whether as an [administrator, lecturer, student].... it seeks to address and to illuminate a complex array of questions.

Concerns

Collecting data from a human and physical environment which is very familiar, and being able to maintain adequate levels of objectivity and impartiality, while limiting biases based on pre-conceived notions of the state of affairs, are very real concerns. One needs to be aware of how memories which are recorded as part of hindsight can be affected by new experiences and changes in the overall perspective and social role of the individual. It can further be argued that the goals which someone has, influence the ways in which they construe the past (Kelly, 1955).

Moreover, the position of the researcher, their own experiences and perspectives, may create a familiarity with the area of study that can lead

to a second-guessing of the participants' meanings. Therefore, reflexivity about the role of the researcher in these situations and the mutual interrogation of the researcher's and participants' experiences is an essential feature of qualitative research. My concerns are so very close to those raised by Pearlette Louisy, a St. Lucian researcher, when she says:

On the one hand, the outsider attempts to make
the strange familiar, while, on the other, the local
researcher is asked to treat the familiar as strange.

(Louisy, 1997: 200)

Stenhouse (1979:8) provides some measure of support for those who engage in insider research, stating that the observer has a direct cultural link to those whom she/he is observing and researching. If within one's research paradigm, there is the understanding that no social activity is value-free, then if the observer or researcher is able to maintain an objective critical stance to the project, that should present a truer reconstruction of reality than that presented by the stranger with his gaps of cultural understanding.

Though Freirean methodology is commonly associated with Adult Literacy Education, I have found that it is equally applicable to general adult education as well as research methodology which seeks information from adults. As such, in conducting this research, I am influenced mainly by a Freirean methodology, where I try to engage in a dialogic

process, with a cycle of action followed by reflection followed by action (praxis), which may hopefully lead to many experiences where the reality of the situation becomes transformed through an uplifted consciousness (conscientization). I subscribe to the notion that it is this sort of paradigm shift which is required for any real and lasting social transformation. I also would like to think that this research is contextual, because it draws on the lived experiences of past and present learners and it becomes a mutual process of reflecting upon and changing an understanding into the evolving culture of the past and present learners. To me, this research is about engaging with liberatory education.

According to Blaxter et al (1996:60) qualitative data like its counterpart quantitative data "offer representations of what we as individuals perceive as our reality". It is felt though that qualitative data "offers more detail about the subject under consideration". In qualitative research, the general aim should be, according to Sherman and Webb (1988:7) "understanding experience as nearly as possible as its participants feel it or live it".

The very quality of qualitative data - its richness and specificity - makes for problems when we try to make comparisons between observations.

(Dey, 1993:95)

Quantitative data on the other side of the coin “appears to provide more precision” due to its numerical output (Blaxter et al, 1996:177). Quantitative research is concerned with the “collection and analysis of data in a numerical format” (ibid:60). However, on their own, both types of data provide only a partial description of the subject being studied. If the situation allows, they can be used to complement each other in the final presentation.

Qualitative Research Procedures

The Case Study Approach

Collecting data involves selecting appropriate methods of investigation which suit the focus of the research. It is also useful to recognise that no single method is able to adequately capture the many subtleties that pervade the human situation. Data which is gathered from this exercise must therefore always be considered within a context and seek to make the experiences which are related a bit more understandable. As Bell (1993:9) states:

A successful study will provide the reader with a three-dimensional picture and will illustrate relationships, micropolitical issues and patterns of influences in a particular context.

The study does not fit neatly into any one category. For example, though the study seemed to be a case study in itself, there are also strong evaluation aspects to it. Agreeing with Worthen and Sanders (1987:29) the research element of this study is concerned with “satisfy[ing] curiosity by advancing knowledge” about such programmes in developing countries and the evaluation element seeks to “contribute to the solution of practical problems through judging the value of the [programme/s] being evaluated.

Blaxter, Hughes and Tight (1996) provided several terms which provided good focal points for reflection: strategic, descriptive, explanatory, evaluative, exploratory, problem solving and action oriented research. Wellington (1996) provided further elucidation by explaining the three major categories of case-studies as proposed by Bogdan and Bilken (1982:40): historical-organisational studies; observational case studies; and the life history form of case studies. These are all applicable to my proposed area of research.

Anderson’s (1990:163) view that “good case-studies incorporate multiple sources of data” and their methodologies are “typically eclectic and combine some of the elements of ethnographic research, program

evaluation and descriptive methods" (ibid: 112) seem to aptly locate the study into a methodological framework. Stephen Kemmis argues that:

'Case study consists in the imagination of the case
and the invention of the study.'

(Kemmis, 1980: 119)

In elaborating on this above statement, Kemmis explains that he sought to clarify the complex and multi-dimensional nature of case-study work. In particular he explicitly highlights '... the cognitive and cultural aspects of case study research". Implicit in that statement is the "... active and interventive character of the research process" which is very dependent on the socio-political position adopted by the researcher. The researcher is involved in "... the conceptualisation of a research problem, the investigation, the interpretation of findings and their application beyond the world of the study."

This has been a particularly challenging experience for me because, as Kemmis (1980: 119 - 20) explained, "... often the decisions [were] taken 'on the spot ', without the luxury of cool and considered reflection away from the real-life exigencies of the situation". The real test in this experience is in moving away from the path of general objectification and to justify my role as a worthy and knowledgeable participant observer who explains and describes the contexts as she sees it while respecting cultural differences, political affiliations and social accountability.

There have been mixed reviews about being able to use case studies to generalise about situations. While some authors argue unequivocally that it would be misleading to use a case study to generalise about a topic or situation, others are more reflective in their response. I think the caution should be against the practice of inductive generalisations. Wolcott (1995:175) argues that though each case is unique, there must be some aspect of it that we can learn from and be able to apply more generally. Simons (1996: 225), in reviewing the development of case study research puts forward the argument that there is a welcome 'paradox' between the study of the uniqueness of a single case and the search for generalisations from that item of singularity. Her following statement says it all for me:

Paradox ... is the point of case study. Living with paradox is crucial to understanding To live with ambiguity, to challenge certainty, to creatively encounter, is to arrive, eventually, at 'seeing' anew.

(ibid: 238)

A case study can be a very appealing approach to research because it can allow a rich and interesting collection of data. This can be open to multiple interpretations by allowing the researcher to use her own experiences to evaluate the data as well as the reader(s). As such they are also classified as belonging to the interpretive paradigm. Case studies which are well done provide contextual insights into real situations thereby verifying "... that context is a powerful determinant of both causes and effects" (Cohen et al, 2000: 181). Through case study research

the researcher could effectively draw the attention of the audience to the subtlety and complexity of the case as a case - a situation, within a specific geographic boundary with defined characters who have defined roles within specific institutional settings (Cohen et al, 2000: 182 - 184).

Linking Research Questions with Methods

Table 5:1 depicts a matrix, where the Research Questions are linked to the type of method which is being used to obtain the answers to the research questions.

Table 5:1 - Research Questions linked with Methods

Main Research Questions	Methods Used
<p><i>Is there a future for teacher professional development in the Caribbean using a distance learning mode?</i></p> <p><i>Can collaborative relationships based on distance education paradigms ever develop to ensure that the host country accepts the challenge of 'ownership' of such programmes?</i></p>	<p><i>Review of literature on distance education; history of education in the Caribbean</i></p> <p><i>Review literature re: the previously conducted distance education programmes in Trinidad (re: the collaborative effort between the University of Sheffield and the Trinidad and Tobago Unified Teachers Association (T&TUTA) as a case study</i></p> <p><i>Conduct interviews with key historical stakeholders of the programme - Sheffield Directors of Trinidad Programmes, previous Project Directors from Trinidad, past Presidents and First Vice-Presidents of T&TUTA, previous tutors of the programme, Directors of Education and Education Planning Officers in Trinidad.</i></p>

Main Research Questions	Methods Used
	<p><i>Conduct a tracer study of the progress of the graduates and non-graduates of the programme using perception questionnaires</i></p> <p><i>Monitor the development of proposed teacher professional development programmes in the Caribbean by attending meetings, conducting interviews with key stakeholders and conducting surveys with new students.</i></p>
<p><i>How appropriate is it to import distance learning models from developed Western Countries like the UK, especially when those countries were until quite recently colonial powers who built their nation on the slavery of others?</i></p> <p><i>To what extent has the programme been able to develop a curriculum which is appropriate for the needs of educators in the social and cultural contexts of the Caribbean?</i></p> <p><i>In what ways has the programme through its pedagogy been able to engage with the needs of the educators in the social and cultural contexts of the Caribbean?</i></p> <p><i>How effective are the programmes of distance education implemented by the University of Sheffield in the Caribbean?</i></p>	<p><i>Analysis of, reflection on and synthesis of literature and collected field data</i></p>

Document Research

The seeds of the present are embedded in the past and it is therefore impossible to understand the present without being able to understand

the past through some form of historical re-construction. A major part of this research is historical and this has set the stage for Chapter 6 which links post-Independence developments in Trinidad and Tobago with the beginning of the links with the University of Sheffield. As such, primary documents of a broad variety such as education policy documents, official reports, minutes of meetings, memoranda, course outlines and other planning documents have been reviewed in order to establish a historical understanding of past events. During the experience of unearthing the past, I discovered that some documents were incomplete while others were extremely difficult to locate. However, documents whether incomplete or not, usually assisted the researcher in placing events within a specific time frame. This facilitated the sequencing of events which occurred at various points within the period of the programme in a fairly reliable manner.

Examination of records proved to be quite time consuming and did open up a host of ethical issues with regards to access to files and other documents of a 'confidential' nature. Once the challenge of accessibility has been overcome though, one of the advantages of writing histories of this sort is that it gave the researcher freedom to work with the documents in terms of time and location (Adams and Schvaneveldt, 1991:304 - 5). In the analysis of data gleaned from these documents, every

effort was made to “illustrate the relationship of the education system to the structure of society” and avoid oversimplification of events and overgeneralisation of situations (Cohen and Manion, 1994:54).

Oral History and Memory as a Source of Data

Oral history, perhaps because it is dependent on memory, has been dismissed by traditional historians as not being authentic. Memory, explains Chamberlain, (1995: 94) "...is malleable, is susceptible to confusion and conflation, to lapses and lying, to suggestion and sensation, and always to the role of the imagination". In spite of this argument, memory of circumstances and events may be all that is left to record the 'stories' of social groups who went through similar experiences. These groups may be tied together because of commonalities such as gender, race, class, and culture.

Memory is a human capacity and as such offers particular insights to an event or series of events in time and place. Its validity lies in the notion that it may present a different level of credibility to events because of its autobiographical nature. Cultural traditions, values and beliefs are transmitted as a result of memory. In the Caribbean, the Africans and the East Indians have been able to preserve some of their stories, songs, dances and other cultural practices as well as aspects of their religions based on memory. The Middle Passage did not afford them the luxury of

pen, paper, video-tapes or dictaphones. All they had was their memory to keep their traditions alive. Chamberlain (1995: 108-9) argues that:

The language of memory is the means by which tradition is transmitted, the means by which structure and values are internalised, passed on and inherited. Memories are imaginative recountings, representative of a set of meanings, by which and through which lives are interpreted and transmitted, constructed and changed. Rather than relegate gender and memory to the edges of history, they should be foregrounded as one of a set of central, interpretative tools for understanding the nature and process of historical change.

SWOT²

As was previously mentioned, during the period May 1996 - August 1998, I was the Course Director of the Masters of Education programme in Special Education. Towards the end of the first year of the course, on June 17, 1997, I conducted a SWOT analysis of the programme during one of our regular staff meetings. The group felt that it was an appropriate time for reflection on the past year's work and agreed with the exercise. I have retained the original sheets from this exercise and the analysis derived from this will be shared in a later chapter which will look at the reflections of some of the key actors of the programme.

SWOT analysis is a versatile methodology that can be used to examine potential strategies for improving any situation whether the nature is

² SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats.

private or professional. It can be used in organisations which are community-based, governmental, non-governmental, or even private enterprise. During a session, participants are asked to share and analyse some of their observations and perceptions about the organisational SWOT and make some calculated predictions as part of the planning process. The analysis itself is derived from the synthesis of the findings within each of the four categories. The linking of the different elements and the extensive nature of the data collected as a result of the analysis of the observations can serve as a catalyst for roundtable discussions and the refinement of current strategies and/or the generation of new strategies and contribute tremendously to the vision of the future.

However, because the responses are primarily based on the experiences and perceptions of the group of participants, the strategies which arise from this exercise are based on the users' mental models, their mindsets, perceptions of the environment, culture, preferences and biases. In spite of seeing it however as being totally from other people's viewpoints, and potentially unconvincing and invalid, I prefer to regard their contributions as the perspectives of the insiders.

Structured Face-to-Face Interviews

The structured interview had been chosen as one of the means of collecting data from policy-makers, lecturers and Caribbean tutors because of its adaptability, flexibility and its personal, professional touch. Though time-consuming, interviews provided the researcher with the opportunity to use the oral culture of the people to effectively “follow up ideas, probe responses and investigate motives and feelings which the questionnaire can never do” (Bell, 1993:91).

If skilfully done, the interviewer can get a fairly clear insight into the values, preferences, attitudes and beliefs of those from whom information is sought. When used in conjunction with other research methods, it may help to follow up leads on unexpected results, validate other methods, further explore the motivations of respondents and the reasons for their responses (Kerlinger, 1970).

The responses from interviews can be very instructive because they can sometimes be used as “explanatory device[s] to help identify variables and relationships” and/or “to test hypothesis or even suggest new ones” (Cohen and Manion, 1994:272-3).

As a researcher, one has to be very careful when interpreting verbal responses along with non-verbal cues because there is always the risk of bias in the interpretation of what is being presented. Interviews have been described as having a tendency towards subjectivity because both the researcher and the interviewee are social beings whose verbal and non-verbal cues may affect each other positively or negatively during the interview process.

Efforts have been made to provide some focus and maintain a reasonable time-frame for the interview session with due consideration for the busy schedule of the interviewee. Care was taken to design the questions so that they would have a direct bearing on the research objectives and not offend an interviewee or make them ill-at-ease. One of the strengths of the interview is that it allows clarification and probing which is not possible with a questionnaire.

Electronic Interviews

The increasing use of email as an integral medium of day-to-day communication suggests that some form of consideration be given to it as a research tool. Because of the challenges of distance, I decided to explore this route by using the concept of an 'e-interview' as a means of collecting data from some of the previous stake-holders of the

programme. As this is a new approach, I have not been able to find much literature on the subject and at the moment this seems to be pushing at the boundaries of methodology.

My idea was to include the former stakeholders as a part of the sample because I was already in contact with them via e-mail. I recognised immediately that though email is efficient, it is not always effective when one uses an overly conversational 'tone' for an item of business. In order to get it right, I asked myself the following questions:

- What am I trying to accomplish?
- Who would I include in this 'experiment'?
- What image would I want to project?

I wanted quality feedback from my interviewees but I did not want them to feel that I was being a nuisance by sending them some 'new' form of electronic 'junk mail'. The principal feature that I wanted to portray was the serious intent of the exercise and so, I set about developing what I considered to be a very professional image so that the recipients would be motivated to answer the questions which were on the structured electronic sheet. For easy referencing, the questions were subdivided into themes which were highlighted.

E-mail seemed to be the perfect solution to overcome the 'tyranny of distance' since all these interviews took place with interviewees in a different geographical location (the United States) from me (the United Kingdom). This facility was also available to all, cheap and efficient. As a research tool, the speed of transmission was comparable to none. There was no problem with contacting the interviewees at 'appropriate times' due to time zone differences. Persons accessed their e-mails accounts at their convenience (Selwyn & Robson, 1998). What I discovered was that there was more of an opening for fluidity and interactivity due to the nature of e-mail. Respondents felt free to choose their own style when responding to the different questions / themes. They used different fonts, colours and formatting styles. They grouped their feedback differently and they even used colour to highlight their responses. I was able to ask for clarifications when I did not understand the point they were making.

One of the short-comings of using e-mail, is that it does not project emotions as well as face-to-face communication or even telephone conversations especially if you are using a professional, business approach. There are no cues which could link the interviewee to the interviewer, so cues such as vocal inflections, diction, dialect, dress, gestures and a shared physical environment are absent from the

communication. 'Netiquette' which substitutes paralinguistic and non-linguistic cues with emoticons was not an option that I wanted to use because I think such cues are better suited to light-hearted, personal correspondence.

Indeed, one had to be as professional as possible, using the same principle of providing information on the subject of inquiry and ensuring that the questions on the attachment were clear and unambiguous and relevant to the research questions. Because the entire transaction took place via electronic mail attachments, the text and presentation had to be as attractive as possible to maintain some sort of interest in the topic and tailored to a popular word-processing package that was available to all. Transcription which is usually a tedious exercise was much more manageable using e-interviews because the interviews were easily tailored for use in a word-processing package. This also eliminates errors in transcription.

From experience and my own reaction to certain types of email communication, I imagine that many persons may suffer mishaps because they did not understand that depending on the context of the situation, one has to adjust the communication styles to the medium of the email.

Focus Groups

The use of 'Focus Group' interviews to collect data was initiated by Merton and his colleagues in the 1940s as a means of generating data for analysis. In this procedure, organised discussion is usually focused on a certain topic with a selected group of persons in order to gather information about their views and experiences related to a specific topic. In this type of research group dynamics play an extremely important role in the data that is generated because the group interacts not only with the moderator but also with the group itself in a sort of simultaneous activity. Comments and varying perspectives are shared among each other. During such sessions, researchers may be able to elicit information about issues which are considered salient and capture information regarding why it is considered as such (Morgan, 1988 in Gibbs, 1997:3).

This type of strategy has the advantage of loosening inhibitions from those who may be coy to volunteer information about a programme. They may feel bolstered by the outspoken comments of others in the group and so the presence of a focus group provides a forum to support a widened range of responses. It may even assist in activating memories of 'forgotten' experiences. In the analysis of data collected from such activities, the researcher should be able to get some understanding of the experiences of the group, the dynamics of the situation and perhaps even

a clue as to why it was happening.

In spite of these perceived benefits, some researchers feel focus groups could be considered fertile soil for intimidation of those who may be shy or lack oral fluency. Rather than facilitate growth and sharing of experiences through discussion, the result could be the 'contamination' of the views of other members and so too their 'true response' (Catterall and Maclaran 1997, para 3.3). Recognising this drawback in the use of focus groups for data collection, one should therefore not be too eager to assume that the views expressed during such sessions are those owned definitively by the individuals who express them as their own. Another consideration is that persons within the group who are privy to personal or sensitive information may not be willing to share this in a group setting. When instances such as these are sensed or known, then a viable alternative would be the use of a private interview.

Albretcht, Johnson and Walther (1993) as quoted in (Catterall and Maclaran 1997, para 3.5) believe that the data that is provided in focus groups is 'more ecologically valid than methods that assess individuals' opinions in relatively asocial settings'. This to my mind can only be so if the moderator of these sessions possesses and displays excellent levels of group leadership and interpersonal skills (Gibbs, 1997:1).

Morgan (1997:53) suggests that the moderator should not try to 'manage' the group by applying rigid rules but "legitimate the members' responsibility to manage the group" themselves. This is one in a series of techniques identified in conducting "low-moderator-involvement" focus groups. At the onset, the moderator leads by using the strategy of the self-fulfilling prophecy and therefore models the behaviour that is expected within the session. During the session, the moderator using this model could at strategic points cue them how to handle common problems; emphasise that you want as many perspectives as possible; get them to use questions to direct the flow of interaction; emphasise hearing about their experiences; and stress that all experiences are equally important to you (Morgan 1997: 53).

Analysis of the focus group data can reveal several important pieces of information such as whether the question was interpreted as was intended. One cue to this would be whether the group asked for further clarification. The facilitator can also get an insight into the beliefs about the topic under discussion through the identification of those which are challenged; the various types of arguments which are used to defend challenged positions; the various sources of information and/or experiences which members of the group use to justify their position; the non-verbal communication and para-language which members use to

provide responses, ask questions or talk to each other in the group; the types of information or arguments which stimulate or inhibit participation and/or reinterpretation of ideas and experiences (Adapted from (Catterall and Maclaran 1997, para 4.6).

Questionnaires

The use of questionnaires to collect data has several distinct advantages. Questionnaires, according to Bell (1987:76), are useful tools in collecting certain types of information from various groups of people quickly and inexpensively. In an effort to understand the efficacy of the various courses which have been taught by the University over the past ten (10) years and the perceived contribution to the lives of the graduates, carefully designed and pilot-tested questionnaires were distributed to past participants of the programme (graduates and non-graduates) to secure information about their feelings, knowledge, preferences and attitudes to various aspects of the programme.

As a researcher, I sought to clarify the purpose of the research and the type of information that was needed before any attempt was made to formulate questions. The normal guidelines which are provided for the design of questionnaires were adhered to, to ensure that the content was

not ambiguous with leading or offensive questions and the layout was attractive (Pat Ellis Associates Inc., 1995 : 60-1).

Because the questionnaires was in the respondents' possession, they were allowed the space within which to think carefully about each question before responding.

Questionnaires can be distributed using a number of different means. They can be delivered by regular postage, hand, electronic mail and with time permitting, they can even be "administered over the telephone or face-to-face", where the latter case is more akin to an extremely structured interview. This flexibility in the method of distribution is a real advantage because it facilitates access to many people who operate in different geographical locations. The drawback is that there may be a low response rate for postal surveys (Blaxter et al, 1996 : 160).

In order to avoid frustrating the respondent and to obtain as far as possible a range of responses to various key issues, it is recommended that several types of questions be used:

A. Loosely Structured Type of Question

Verbal or Open-ended - where respondents are given the opportunity to explain themselves in some measure of detail with a phrase or two or three lines;

B. Types of Questions with Greater Structure

- List or Multiple Choice - respondents are required to select a response from a provided list;
- Category - respondents response can only fit into one of a given set of categories;
- Ranking - respondents are requested to rank qualities, characteristics or other choices in rank order;
- Scale - Respondents are expected to react to items in varying degrees of intensity by selecting a response from a range of choices;
- Quantity - An exact or approximate numerical request is sought from the respondent;
- Grid or table - Here respondents are requested to use a table or grid format provided to record their answers to two or more questions.

(Blaxter et al, 1996 : 160; Youngman, 1986)

Questionnaires are easier to follow when they are broken down into sub-sections or themes. A measure of uniformity is obtained in the questioning since one format with the same questions is used for all participants within a pre-determined sample. Though these arguments are all in favour of the use of questionnaires as an effective data collecting tool, there are some areas, as stated earlier, in which the interview method

would be better suited. In cultures where there is a very strong oral tradition, as is widespread in the Caribbean, people at various levels of the system feel much more comfortable expressing themselves orally. It may therefore prove to be quite challenging trying to persuade some persons within an identified sample to complete and return questionnaires.

Respondents may prefer to remain anonymous and so confidentiality must be ensured in the design of the questionnaire. The completed questionnaire was pilot tested with a group similar to that of the official sample in order to provide necessary feedback on any questions which lack clarity or contain ambiguities. The questionnaire was then revised and re-tested before the official distribution (Borg and Gall, 1989: 435). The plan was to use the computer software Statistical Programme for Social Sciences (SPSS) so care was taken to format the questions in such a manner that responses could be easily coded and analysed upon their return.

Triangulation

Certainly while conducting this study, one could not under-estimate the importance of 'personal public relations' and clear, precise communication skills. The cultivation of an amiable rapport, trust and reassurance with the

respondents, would be crucial to the success of the data collection process and the retrieval of fairly reliable information.

Further, if the field staff were not aware or did not clearly understand the motivations behind the particular study they may greet the researcher with a level of hostility (veiled or overt) and some suspicion when approached to provide data. This could result in their presentation of inaccurate or incomplete information.

In situations like these, methodological triangulation which has been defined by Cohen and Manion (1994:233) as "the use of two or more methods of data collection in the study of some aspect of human behaviour" allows the researcher to study the "richness and complexity of human behaviour ... from more than one standpoint." Triangulation has several advantages. One method of data collection can only offer a partial view of the complexity of human nature without regard to different emotional situations and variables such as time and place.

Single research methods allow the researcher to view the world in a very compartmentalised selective manner because they act as a filter through which the environment is experienced. This suggests that there is never a neutral position and sole reliance on any particular method would result in

a distorted image of the area being investigated (Cohen and Manion, 1994:233). Another challenge for which the use of triangulation is recommended is that of 'method-boundedness' where researchers use preferred methods with which they are comfortable or they perceive as being superior to others.

Triangulation is a useful technique for case studies in order to obtain a clearer picture of events and perspectives which would have taken place in various social situations. Validity has been recognised as one of the challenges which researchers have to deal with when they are using qualitative research techniques. Respondent validation is therefore recommended by McCormick and James (1983) in Cohen and Manion (1994:241) where:

...the researcher [should] write out his/her analysis for the subjects of the research in terms that they will understand, and then record their reactions to it.

The interpretation of data involves a process of selection based on judgements which themselves represent a subjective construction of the experience and actions of others. Ultimately "evaluation leads to a judgement about the worth of something" (House 1980:18). In the process, it was virtually impossible to refrain from judging the actions of the various actors in the context of their vested interests and their roles

and the possible motivations for being involved or contributing to the programme at various levels. This emphasised the need for informant verification through such measures as the review of transcripts.

Ethical Principles and Rules

All research is concerned with producing valid and reliable knowledge in an ethical manner.

(Merriam, 1988: 163)

During one of my visits to Trinidad, I met with the Minister for Information and Distance Education and his Permanent Secretary. The Minister was effusive and sought to sell the successes of his newly established Ministry. He appeared delighted that some one in the country was actually pursuing research in that area. He immediately set upon suggesting areas that were of interest to him that I could explore. Then he indicated an interest in sharing the supervision of my work. He appeared to be placing some not-so-subtle psychological pressure on me to pursue his cause. This illustrated how competition between different interest groups for access to, and control over, the data could create ethical dilemmas for the researcher (Merriam, 1988: 163).

Negotiating Access - Safeguards to Ensure Privacy and Confidentiality

As a full time research student in the UK I have had to establish a

Caribbean network to support my endeavours in respect of appointments and collection point(s) for the return of questionnaires. The involvement of these intermediaries emphasises the need for safeguards to establish and maintain anonymity and confidentiality.

The countries of the Caribbean which form part of the research are geographically small and closely linked through organisational, political and familial affiliations. Though one would want to ensure that there is a high degree of confidentiality in the conduct of this research, one can only wonder how practical this would be in this context of societal 'smallness'. Everyone knows everyone else and, because of this, someone reading the finished thesis might easily identify the significant persons involved in the study.

The issue of anonymity and confidentiality is made even more complex when considering the type of research in which I am involved, in comparison to the writing of educational history. In historical writing, key persons are named and situations contextualised. In so far as my research combines historical and sociological perspectives, the importance, and indeed the validity of anonymity may be questioned. What appears to be important here is that I fully discuss this issue with my informants, allowing opportunities for them to seek anonymity where

they feel this is appropriate while retaining the voice of historical authenticity embedded in the unique perspectives of key policy makers, opinion formers and practitioners.

Because of the dynamic nature of the programme being studied, many of the persons who were interviewed, had a story to tell about the history of the programme and the administrative and political challenges which have surrounded it. In situations like this, probably involving disclosures of highly sensitive nature, I was acutely aware that I needed to guarantee the interviewee's rights to privacy. I could understand past students of the programmes being concerned about victimisation. In some instances, the information received was of a highly sensitive nature and it was treated as such. Where this was the case, data was interpreted in such a manner that no one person was singled out.

In the first instance, I had to seek their approval so that they could be interviewed, then I recognised that confidentiality would be:

... necessary to protect individuals from inappropriate use of information which is private to them. Rules of access and consultation give individuals opportunities to decide what to share, to reflect on what they have shared, to edit or comment upon their information in context: to control, in other words, the use of their own information.

(Simmons 1984: 88)

I decided to develop a code of ethical practice based on the principles of informed consent. This is contained in a Research Information Brochure which was distributed to all persons to whom questionnaires were sent and all interviewees. (See Appendix 2)

Data Collected

The following data collection plan gives an indication of field-work that I have completed. Where possible samples of data collection instruments have been placed in the Appendices. (See Appendix 3)

Face - to - face Interviews - Trinidad

- Chief Education Officer, Ministry of Education
- Director of Educational Research and Evaluation Project
Co-ordinator Ag., Education Project Co-ordinating Unit
Course
- Director - Masters programmes in Trinidad
- Course Director of Certificate - Diploma Programme in
Special Education -
- 5 PhD students from 1st Remote Location Cohort -
Trinidad including the Director of the Caribbean
Institute for Research and Professional Education

Focus Group Sessions - Trinidad

- M.Ed. Special and Inclusive Education students
(2 groups of 15 students each)
- M.Ed. Education Studies students
(2 groups of 20 students each)

Notes from Meetings - Trinidad

- Permanent Secretary, Ministry of Education
- Chief Education Officer, Ministry of Education
- Minister and Permanent Secretary from the Ministry of Distance Education

Notes from Meetings - St. Lucia

- Permanent Secretary
- Human Resources Manager
- Executive of the Teachers' Union

Electronic - interviews via e-mail - USA - November 1999

- First Project Director of Certificate-Diploma and M.Ed. Programme
- Former Project Director of Certificate - Diploma Programme
- Graduate of the M.Ed Programme and former Local Tutor of M.Ed Programme & Lecturer on the Certificate - Diploma Programme

Questionnaires - St. Lucia

Distributed and received responses from first cohort (1999 - 2001) of Certificate/ Diploma/ Masters Students in Educational Studies:

- July 1999 (n= 36, responses = 36)
- January 2000 (n = 36, responses=35)
- July 2000 (n=36, responses=33)
- March 2001 (n=30, responses=21)

Face - to - face Interviews - U.K.

- Interview with First UK Course Moderator of Certificate/Diploma Programme
- Interview with Long Standing UK Lecturer on the Caribbean Programmes and current Chairperson of the Caribbean Policy Committee
- Outgoing Director, Caribbean Programme

Questionnaires - Trinidad

The following questionnaires have been distributed in Trinidad. (See table 5.3 below)

- Questionnaires to 1999 Certificate - Diploma cohort
- Open-ended questions to 1998 - 2000 M.Ed. groups

Table 5: 2 - Sample Frame of Questionnaires for Distribution to Former Students

Course	Cohort	Graduates	Representative Sample	Returned
Certificate	1989 - 92	22	3	1
Certificate	1993 - 95	14	4	1
Certificate	1995 - 97	7	1	-
Diploma	1989 - 92	43	16	2
Diploma	1993 - 95	35	35	2
Diploma	1995 - 97	10	10	1
Masters - Special & Inclusive	1993 - 95	18	18	3
Masters - Special & Inclusive	1996 - 98	16	6	1
Total		165	93	11

Methodological Challenges

No research is without limitations; this study is no exception. In spite of months of planning and pilot testing, the response rate for the survey was extremely low. Several reasons could be attributed to this. Trinidad enjoys a very oral tradition and persons would gladly speak with you in person but would find it tedious to complete questionnaires in writing. The questionnaires may themselves have been daunting because of the length. Some of the former participants may have moved to other locations within the country and left no forwarding address as is done in developed countries.

Conversations with former colleagues and friends in the teaching profession as well as reports from local newspapers suggested that the workload of teachers in Trinidad had also increased considerably. This resulted in an exodus of teachers to other Caribbean islands, the US and the UK. As a result of this, the remaining teachers had to 'double up' in order to address the shortage of teachers in schools. This would have made the situation incredibly difficult for teachers who would have completed a questionnaire under normal circumstances. I subsequently discovered that many had migrated to the United States and England as a result of vigorous job campaigning by teacher-recruitment officers from those countries. Though I was devastated at first, I was able to recuperate

sufficiently to devise another angle for my research; and so, in spite of these challenges, I was able to gather sufficient student related data to complete the study. I turned to the current cohort of students in Trinidad and identified the proposed cohort in St. Lucia as my 'new' data sources.

The challenges which have been outlined and explained above also offer explanations of the relative ease of obtaining responses from the 1998 - 2000 M.Ed. groups in Trinidad and the first cohort of Students in St. Lucia. In Trinidad, I did not possess a contextual understanding of the dynamics of the 1998 - 2000 cohort and decided to use focus group sessions to obtain feedback from them to compensate for that short-coming. I was allowed a session following lunch to meet with the students and I felt that even a short questionnaire would have been inappropriate, since I did not know them and they might be a bit lethargic in the heat after a substantial lunchtime meal. Although I had gained access, I felt that I had to work on gaining 'acceptance'. This I was sure was only possible if I could have a 'good chat' where I could connect my 'Trinidadian-ness' with theirs. This I perceived to be a more fruitful strategy in getting them to respond. This was indeed the case and it also allowed me the flexibility to probe deeper for further clarification as needed during the session.

As a result of the Trinidad survey experience, the decision was taken to limit the number and content of the questions in any questionnaire administered, with the intent to follow the first with other in-depth ones in St. Lucia until the course was complete. This would facilitate me tracking the responses for an entire cohort of students and this was possible because I was present at all study schools as part of the teaching team from the University of Sheffield. I was therefore able to 'legitimately' distribute and collect responses during each 'last' session as part of the course evaluation. The questionnaires were also shorter because they sought to capture data related to one period in time.

Another challenge which I experienced was 'over-load'. My interest and long affiliation with the programme ensured that I had an overwhelming collection of reports, minutes of meetings, completed evaluation sheets, brochures and course booklets etc. This made the task of collation of data even more difficult because I was practically inundated with data and at times felt completely overwhelmed by the situation in which I found myself.

Identifying Themes

What was helpful, was the decision to focus on specific themes which were both very important to me and which emerged from the various

data sources. The wide assortment of data collected allowed me the flexibility to choose from a wide selection of themes. I felt that since this was the first formal research conducted on the programme, an attempt should be made to consider it from a historical context. This resulted in me focussing on developing **the historical aspects of the programme from different perspectives** and linking that to the history of teacher education in the Caribbean.

As this programme is still developing, we need to understand the nature of the students in the Caribbean and so the data was used to identify **the profile of students in the Caribbean**. Because the philosophy underpinning the programme is based on critical thinking and pedagogy and notions of liberatory education, the feedback from the first cohort of students in St. Lucia was important in terms of: **the relevance of the course; their experience of support from the University; and, library issues**.

The University of Sheffield generally emphasises the research-led character of their courses. Therefore one of the necessary themes of this research was considering how this programme contributed to **developing a research culture in the Caribbean**. While exploring the issues which were relevant to conducting courses via distance learning, I

recognised that there were aspects of the programme that might constitute a hidden curriculum, and therefore felt it important to explore **the hidden curriculum through distance education.**

Of course there are the usual constraints of time and money which affects all researchers. Accessing relevant literature was also very problematic. There isn't a wide literature on the history of teacher education in the Caribbean and though there are lots of new developments in distance education, the University's main library left much to be desired in terms of its in-house stock. However, having access to the internet, electronic journals and the use of inter-library loan vouchers in borrowing books from the British library or from other libraries in the world were invaluable in sourcing the necessary literature. Without those facilities, this dissertation would have suffered greatly.

In this chapter, I have: explained the complexity of this research through its many methodological dimensions; identified the research questions and linked them to specific methods; identified ethical principles as well as methodological challenges; and, identified the key themes which have emerged from the research as being in need of further unpacking. The latter will be explored in further details in Chapters six to twelve.

CHAPTER 6: Origins of the Trinidad Programme: Linking Post Independence Developments in Education with the University of Sheffield

Introduction

This chapter begins with a brief overview of Trinidad and Tobago and traces the colonisation of Trinidad, along with the introduction of education to the island. The major developments in education in Trinidad and Tobago during the late 1950s continuing to the 1990s are explored. Particular consideration is given to post-independence developments in Special Education and how those gave a relationship between local teachers and the University of Sheffield. This chapter also highlights the role of non-governmental organisations in the development of this relationship.

Brief Overview of Trinidad and Tobago

Trinidad and Tobago is the most southerly dual-island country of the Caribbean which gained its political independence from Britain in August, 1962. It is a unitary state with a representative government and a Head of State who is a non-executive President selected by Members of Parliament. The population, which is predominately of African and East Indian descent, is approximately 1.35 million including the 51,000 from Tobago. Approximately 53.3% are male. English is the official language;

but, at the level of the street, this is mixed with dialects of Hindi and French/Spanish patois (The Commonwealth OnLine, Trinidad and Tobago, 1998).

Trinidad and Tobago were separate territories prior to 1888. Trinidad, though a Spanish colony since the arrival of Columbus in 1498, was constantly raided by the British, Dutch and French. In 1797, the rulers surrendered to the British and five years later the island became a British Crown Colony. The African slaves were emancipated in 1834 and between 1845 and 1917 immigrants from India, China and Madeira were brought in as indentured labourers (The Commonwealth OnLine, Trinidad and Tobago, 1998).

Tobago has been described as the country which changed hands more frequently than any other Caribbean territory between 1640 and 1814, when it was returned to the British. In spite of this, Tobago was regarded as prosperous. Then, the abolition of slavery, followed by devastation by hurricane, a decline in the West Indian Sugar Industry and the Belmanna Riots¹ weakened the economy of Tobago.

¹ So named after Corporal Belmanna, a Barbadian 'oppressor' who was the object of a riot by a group of slaves from Barbados who went to Tobago to settle and work on the Roxborough estate. They revolted against the burning of one of their women folk as well as the oppressive physical conditions and economic slavery imposed on them by the plantocracy.

As a result, the tiny island (300 sq km) was amalgamated with the larger, neighbouring island of Trinidad (4,828 sq km). (The Commonwealth OnLine, Trinidad and Tobago, 1998)

The economy of the country is supported mainly by oil and natural gas with approximately 30 oil and gas producing fields. It boasts of the world's largest natural source of asphalt, produces 20% of the world's methanol exports and is the world's largest producer of ammonia. Tourism also features as the fourth largest foreign exchange earner relying on the natural beauty of Tobago and the yearly Carnival in Trinidad. The reluctance of the African segment of the population to work on sugarcane, coffee and cocoa plantations because of the historically scarring effects of slavery, the increase in industrialisation, and pest infestation of crops, ensured that the importance of agriculture as a major contributor to the economy has been greatly diminished. (The Commonwealth OnLine, Trinidad and Tobago, 1998)

Colonisation of Trinidad

Trinidad's first inhabitants were the Amerindians. On 31st July 1498, Christopher Columbus claimed the island of Trinidad as part of the Spanish Empire, but the settlement of Spaniards only began about a century after the first landing. Brereton (1981: 2) writes:

The formal structure of a Spanish colony had been established in 1592, but for nearly two centuries Trinidad remained undeveloped and isolated. ... Most of the island remained untouched by European enterprise until the last decades of the eighteenth century.

Recorded history reveals that while other West Indian colonies of France, England and Holland were major producers of tropical crops for export to the various European empires, Trinidad for the most part remained almost untouched.

In an attempt to develop the country, the Spanish Government issued an immigration decree referred to as the Cedula of Population which allowed French planters with their slaves free access to land in Trinidad. This changed the demographic structure of the country forever.

By the 1780s, the native Indian population had diminished considerably and there were more white French people, French coloureds (later called French Creoles), French slaves than white Spanish people, mixed Spanish and Spanish slaves. Trinidad was fast becoming a major producer of West Indian crops (sugar, cocoa, cotton, coffee and staples such as rice, maize and ground provisions) and a virtual French colony "...dominated by a French planter elite" (Brereton, 1981:22).

The 1790s saw an increase in the prosperity of Trinidad and the British shipping merchants dominated the scene. Port of Spain, which was only a tiny port became transformed into a hub of activity from international trade and wealthy foreigners. In February 1797, the British conquered the Spanish army in the West Indies and Trinidad changed ownership. The British government placed Sir Thomas Picton, a soldier in charge of the island and he ruled with an iron fist reigning terror indiscriminately on both slaves as well as free coloureds. Brereton (1981:34) referred to this period as "Picton's Monstrous Tyranny".

By 1802, after intense lobbying by the abolitionists, Picton who perceived slavery merely an opportunity to be milked in the process of economic exploitation, was becoming an embarrassment to the British government. In spite of this, by 1810, Trinidad which was underdeveloped less than two decades before, ruled economically in terms of slavery and sugar (Brereton, 1981: 47); and, until the passing of the Emancipation Act in 1833, the island was used as an 'experimental colony' (p.52) where "... new policies for improving the status of slaves were to be tried out." Though August 1, 1834 was declared as Emancipation Day, it was not until four years later than full freedom was won by the slaves in Trinidad. In the meantime, the free coloured suffered intense social humiliation at the hands of the British colonisers.

Trinidad always experienced a labour shortage and after emancipation, “ [t]he population of Trinidad was, ... augmented by immigrants from the USA, the Caribbean, Africa and Europe, adding new elements to an already diverse people” (Brereton,1981:99). They however, did not meet the requirements of the plantation owners who required a large number of cheap easily managed labour.

In May 1845, the first group of indentured labourers from India arrived and in 1853, the first group of indentured Chinese immigrants arrived. The indentureship scheme from China was too costly and so, the British settled with labour from India (which was an existing colony) and authorised the immigration of Indian labourers to Jamaica, Guiana and Trinidad. There was a steady flow of such labour until 1917 and the island became segmented according to race and class. During the period 1838 - 1938, there were according to Brereton (1981: 116) divisions along four major sectors:

There was the white upper class; few questioned its ranking as the political, social and economic elite. There was the black and coloured middleclass, distinguished by education and by white-collar jobs. There was the Creole working class, mainly of African descent. Finally, the Indians, although strong numerically, were separated from the rest of the population by culture and religion, by race and by legal restrictions, and by their relatively late arrival.

An Introduction to Education in Trinidad and Tobago

Education was responsible for the upward mobility of the black and coloured middle class and this opportunity contributed to the erosion of power of the white ruling class. Education "... exercised a powerful influence on social development" because it provided a way out of the plantation for the blacks and the coloureds (Brereton, 1981:122).

There are several hypothesis related to why public education was offered in Trinidad. Firstly, the British government perceived that they had some responsibility towards the ex-slave population and their children coupled with the interest of some benevolent officials on the island. There was also a proselytising rivalry between the Roman Catholic Church and the English Catholic Church because each perceived education as a means whereby they could each increase their flock (Brereton: 1981:122 - 3).

Since independence, the country has made major strides in offering free compulsory primary school education to those between 6 and 12 years of age, and building an education system which provides access to pre-school through to postgraduate studies. In spite of this seeming success, the present education system was, and to some extent continues to be, influenced by the former British colonial system. Michael Alleyne, a former Chief Education Officer of the Ministry of Education, in his

analysis and commentary on the development of education in the country, remarked that:

(t)he effects of Trinidad and Tobago's emergence from four and a half centuries of colonialism were invariably negative.

(Alleyne, 1996:18)

Particularly obstructive in the path of the development of a national society was the phenomenon of the "colonial mentality" ... In Trinidad and Tobago, it is manifested not only in educational matters but also in widespread low appreciation of things Trinidadian or "local". The notion is entertained that education holds the key to the solution of the "national inferiority complex".

(ibid: 68)

Braithwaite (1991:52) has described the period prior to 1964 as "one of educational stagnation". Though primary education was afforded to all, there was only limited expansion in the secondary school system simply because education was not deemed appropriate for the masses. This, according to, Braithwaite "reflected an elitist, exclusive concept of secondary education" (ibid.).

Moreover, the school curriculum was strongly Eurocentric in nature. The first Prime Minister, Dr. Eric Williams (1969:35), alluded to this when he was relating his primary school experiences in years just prior to 1922:

My arithmetical problems dealt with pounds, shillings and pence in the classroom, but I had to reckon in dollars and cents when I went shopping for my mother.

In 1869, Lord Keenan, of the British School Inspectorate, reporting on the state of education in the country, had recommended the inclusion of texts with lessons which depicted the life and experiences of the colony. In spite of this recommendation, books which depicted local experiences were not introduced until 63 years later.

Though late in coming, this injection of locally influenced material did little to change teachers' perceptions of teaching or their content. Paradigms were shifting very slowly and in the 1960s teachers were still teaching children that a calendar year comprised of four seasons and that snow and Christmas went hand in hand. Families bought pressurised fake snow or used cotton wool on their Christmas trees. Having been fed this for several generations, it was not surprising that the society felt obliged to carry out this 'foreign' tradition. People had been indoctrinated to believe that their salvation came from the ideologies of those from 'abroad' - everything 'foreign' was deemed to be better.

Also included in this stagnation, was the attitude of the leaders to teacher education. Keenan (1869: para 50:16) expressed the view that the monitorial or pupil-teacher system was recommended because "the carrying on of a large primary school without the assistance of monitors might be likened to the handling of a regiment without non-

commissioned officers". This pupil-teacher system continued until the 1960s.

Post-Independence Developments in Education

Prior to the era of independence, the colonial government, through their commissions, perceived education as merely a social service with a strong religious input that was necessary to keep the slaves and indentured labourers in a harmonious state and perpetuate the European culture. According to Alleyne (1995:65), the two most significant documents which charted the course for development for Trinidad and Tobago during the years immediately prior to and after independence from Great Britain were the Five-Year Development Program (1958 - 1962) and the second Five-Year Plan (1964 - 1968).

Recognising that during this pre-independence era, the country had limited resources as a result of a declining sugar industry, the Five-Year Plan (58 - 62) acknowledged that: "... there is no substitute for skill, initiative and industry in the process of social and economic development." Just after political independence in 1962, the second Five-Year plan stated that education was receiving greater emphasis because it was recognised as "one of the most important instruments of social change." It continued by suggesting that the development of individual

personality was the pivotal point between social and economic development.

These were soon followed by a fifteen-year Plan for Educational Development (1968 - 1983), a five-year Education Plan (1985 - 1990) and the Education Policy Paper (1993 - 2003). Between 1983 and 1993, the Government made major capital investments in education annually, by allocating between 12 and 20% of total public expenditure to the development of education. Though this may sound favourable, it will be argued that the quality of education has not kept up with the supposed expansion of education provision. In many ways, the school system was seen to be creating special needs. The Education Policy Paper (1993:4) notes that although the educational expenditure compares favourably with countries in the developing world with comparable levels of national income, it should not mask:

... the necessity for more efficient use to be made of these allocations at the basic level (that is: early childhood to secondary) ... they include only token provision for those with special needs and do not provide adequately for the provision of early childhood care and education for that proportion of pre-schoolers that are educationally at risk.

Education and Politics

The People's National Movement (PNM) emerged as the leading political party in January 1956 and in September of that year, the party headed by Dr. Eric Eustace Williams won 13 of the 24 contested seats in the general elections. Under the 1958–62 Development Plan, the aim was to expand the education services of the country by providing free primary and mostly co-educational secondary schooling to the masses. Therefore, by the end of 1960 there was an increase in both primary and secondary places and therefore a reduction in the numbers paying for private sector secondary education. The government in its effort to integrate the public school system, was seriously opposed by the Catholic Church, who continued to enjoy much political power during that period.

Recognising that this could become a highly contentious situation which could affect the outcome of the general election of 1961, the PNM sought a compromised position with the Catholic Church and the Common Entrance Examination was introduced as the basis of selection into Secondary Schools. The Concordat of December 1960, was the agreement that was entered into between the Government and the denominational boards which allowed Churches to build and own schools and also allowed a dual system of education to prevail (Brereton, 1981: 243; Look Loy 1987: 13 - 14; Campbell 1992: 105; Alleyne 1995: 165). Eighty percent

of those passing the examination were guaranteed a place in Government Secondary Schools while the denominational boards reserved the right to select their intake from within the top twenty percent.

This Agreement allowed the Church Boards:

...considerable freedom in rejecting changes in curricula and textbooks, and gave them the right to allocate 20 percent of the places in first forms of secondary schools 'as they saw fit' ... the churches were left relatively free to carry on as before, and the 20 per cent concession gave them the right to assign scarce secondary school places at state expense to pupils less academically qualified than others who would go unplaced.

(Brereton, 1981: 243-4)

The teachers who were usually handpicked for these 'prestige church schools' were often at a loss on the methodologies to be applied in the teaching of some of these 'hard-to-learn' children. The schools themselves were not particularly concerned because these were usually children of the elite who were quite generous to the schools as a reward for the acceptance of their children.

The next general election was held in 1961 and this time the PNM won 20 out of 30 seats in the House of Representatives with 88.4% of the electorate voting. After one hundred and fifty years of British colonial rule, Trinidad and Tobago gained its independence from Great Britain in

August 1962. The Peoples National Movement (PNM) headed by Dr. Eric Williams won the general elections and promised to further expand and democratise the education system.

Junior Secondary Schools

The fifteen year Education Development Plan of 1968 - 83 emerged as a response to the recommendations of the United Nations Educational, Scientific and Cultural Organisation (UNESCO) educational planning mission (March - June 1964) which suggested that the government create a junior secondary school system to accommodate the "large body of unfortunate children - who are retained in the post primary division of the primary schools" and provide them with a 'general' education (Alleyne, 1996 p.101). However, when the idea of the Junior Secondary System was laid out in the plan, the concept was much more enhanced and included the catering for the educational needs of all children within the 11 - 14 age group.

The recommendations of the UNESCO mission however, had already left a stain on the minds of the people who now viewed the new system as 'less than'. It became a dumping ground for children who were not 'bright enough' to earn a place in the 'prestige' secondary schools. It was simply a case of transferring problems which began at the primary school

level. The double-shifting system was not working very well because too many of the nations teenagers were unsupervised at the age of eleven. They became delinquent finding other pleasurable and sometimes negative pastimes to keep themselves occupied. Teachers at this level were not given any further training which would enable them to work with teenagers who came to them with learning difficulties. The environment in many of these schools was increasingly become violent. Alleyne (1995: 120-1) shares the following comment:

Although it can be argued that the 15-Year Plan did recognize the importance of teachers as a vital element in the educational system, provisions for teacher training, especially for the Junior Secondary schools, were inadequate. It is generally agreed that one of the most effective ways to improve quality in education would be to provide the school with better teachers.

It was not until 1973 when teacher training for all secondary school teachers was made compulsory in England that a one-year training programme leading to a Diploma in Education was offered by the University of the West Indies to graduate teachers (Brathwaite,1991: 31-2).

Although lots of money had been spent in building new schools with better equipment, workshops and labs, the teachers lacked training and

could not communicate effectively with the students in the education process. This resulted in the frustration of teachers, students and parents.

In 1982, the St. Clair King Committee was requested to review the conversion of both Junior and Senior Secondary Schools into full-time (five-year) Secondary Schools. The recommendations of that committee suggested that there was “need for the provision of remedial work at all levels of (the) education system” and that “a centre for the training of teachers in remedial education should be established” (St. Clair King Report, 1982: 60).

Under the fifteen-year development plan, the secondary system had expanded without a comparative development of the facilities of the primary schools of the country. Because of the increasing population of the country and hence the primary school population, the pupils experienced the challenges of inadequate physical accommodation, overcrowded classrooms and very limited availability of basic resource material. It is therefore not surprising that the junior secondary schools were fed children who were significantly deficient in basic literacy and numeracy skills.

The practice within the general school system of automatic promotion by

age, regardless of the needs of the learner further aggravated the situation and the performance of the pupils at all levels of the education system (primary, junior secondary, senior comprehensive and five and seven year secondary schools) decreased in national examinations (Common Entrance, School Leaving, Fourteen Plus and Caribbean Examination Council). Teachers were becoming increasingly frustrated with their lot in the classroom.

Special education was understood in terms of the medical model - something was wrong with the child - physically, sensorily, neurologically and/or mentally. If these special children were lucky, through referral or serious legwork on the part of their parents, they were placed in one of the country's five special schools.

“Educational work with physically handicapped, retarded and delinquent children is undertaken by semi-official voluntary bodies which receive an annual government subvention.”

Great Britain, Central Office of Information Reference Division (1962:41).

The Education Act of 1966 inferred that within the public education system, “... there may be provided special schools suitable to the requirements of pupils who are deaf, mute, blind, retarded or otherwise handicapped”. By 1968, the Education Plan suggested the need for remedial work to support ‘students who were failing’. It was still

inconceivable that the needs of a large percentage of disabled children could be addressed in the mainstream sector. Teachers continued to teach supposedly 'normal' children in supposed 'regular' classrooms.

The Emergence of T&TUTA as the Trade Union

Prior to 1979, there were three associations which professed to represent the interests of various groups of teachers in Trinidad and Tobago. However, the labour laws which existed only made allowance for the recognition of one body to be recognised as the bargaining group for any set of teachers. In April 1979, a group of teachers voiced their disenchantment with the type of representation they were receiving from their respective associations and joined their forces to become The Committee for the Unification of Teachers (COMFUT). For two years this group felt sufficiently empowered to engage in a "struggle for professionalisation and the democratisation of education" (Namsou & Armstrong, 1999:32). They sought to increase their membership from a mere twenty-one, and firmly establish this new group as the collective bargaining representative for teachers and so satisfy the requirements of the Industrial Court as the majority union. In 1980, the Trinidad and Tobago Unified Teachers' Association (T&TUTA) evolved from the COMFUT initiative and was registered as a trade union in 1981 (Lynch, 1991). They were now able to engage in negotiations with the Ministry of

Education and pledged to “champion the cause for the professional development of teachers” in the country (Clarke, 1998: 21).

T&TUTA sought not only to address the industrial relations needs of its members but also their professional development needs. The new organisational structure made provision for the post of First Vice President. This person would be responsible for the professional development of teachers through the functioning of several committees which mirrored established areas within the education system viz.: Primary, Secondary, Technical-Vocational and Special Education. Though, T&TUTA’s Special Education Committee (T&TUTASEC) was formally established in 1986, from as early as 1983, T&TUTA, recognising the importance of special education to a developing society was actively involved in hosting Special Education awareness seminars for their members.

The Union also sought to increase its membership with personnel from Special Schools but this proved to be another challenge to be faced. Even though T&TUTA’s constitution allowed for the membership of teachers from Special School to form the nucleus of the Special Education Committee, those teachers refrained from becoming too visibly involved because of the history of special education in Trinidad, and its

dependence upon the benevolence of voluntary, charitable associations. Few teachers in this sector held any formal certification in Education or Special Education. In one of these institutions, the majority of teachers did not even possess the basic qualifications for entry into the Teachers' Colleges. In that special school, teachers were more concerned with providing nursing care than with providing education. Understandably, they were not accorded the status of "Special Teacher" or "teacher" within the national system. Nevertheless, they were expected to give educational and socio-emotional support to the students within those institutions. Although they expressed extreme frustration and perceived themselves to be oppressed, they refrained from actively participating in the affairs of the Union for fear of victimisation - so strong was the politics of those religious charities.

One of the most important professional development initiatives undertaken by T&TUTA has been its 'Special Education Programme'. Its Draft Policy Proposal on Special Education, "portrayed teachers in the forefront of the struggle for educational change" (Namsoo & Armstrong, 1999:32) and was guided by the following principles:

1. Every child is entitled to an education that will enable him/her to achieve his/her optimum potential.
2. A non-categorical approach to understanding and teaching individual students.

3. ... A belief that most students are best taught all or part of their schooling programme in the regular class.
4. ... A commitment to the idea that educators, families and communities all share in the responsibility for appropriate education of children. (T&TUTA, 1991:1)

The Special Education Unit

In January 1979, a steering committee was established to oversee a 'Project on the Handicapped'. The committee at the request of the Partners of the Americas, invited a team 'on the handicapped' to Trinidad as a volunteer consultative group to review among other things:

- "1. the "existing state of services to the handicapped Including the broad spectrum of health care, education and rehabilitation;

and to advise on:

2. Steps that might be taken to limit the problem of handicapping conditions in the society, and of action necessary to provide the best possible education for children with special needs.

(Winschel Report, 1979: 2)

The group whose undertaking was supported by the Ministry of Education and Culture of Trinidad and Tobago and the Organisation of American States noted the following among their seventeen recommendations:

- "(1) ... that the Minister of Education and Culture establish at a high level of responsibility the position of Coordinator of

Special Education as an integral part of Ministerial affair (to) coordinate, develop and inspect programs in both regular schools and special settings.

- (2) that the Ministry of Education begin developing services for handicapped children in regular schools.
- (6) that the teacher training curriculum be modified so as to prepare regular teachers to deal more effectively with the special needs of handicapped children in the regular school.
- (7) the expansion of training programs in the University and teacher training facilities to fully prepare qualified special education teachers and supportive professional personnel.
- (8) that efforts be made to bring special education professionals and other interested parties together on a regular basis"

(Winschel Report, 1979 pp 6,7,8)

In its response, delivered in 1980, the Government recognised the need for the establishment of a Special Education Unit within the Ministry of Education to co-ordinate the delivery of special education and related services in the country. The United Nations of which Trinidad and Tobago is a member declared that 1981 would be recognised as the International Year of the Disabled and the Special Education Unit of the Ministry of Education was formally established in that year.

The Unit fell under the purview of the Director of School Supervision and among its agreed upon functions are:

- "(a) developing policy on education, care and rehabilitation of

- the handicapped within the community;
- (c) providing services for handicapped children in the existing Special Schools by:
 - (i) further training of teachers and ancillary staff now employed in the Special Schools in order to upgrade their skills;
 - (iv) introducing an integrated special education programme for the phasing-in of education of the mildly handicapped into the normal public schools system;
 - (v) organising of programmes for the training of teachers in skills necessary for the provision of special remedial services to mildly handicapped children in normal schools;

(Pilgrim, 1989: 1-2)

The CIDA Project

During the period 1981 - 1984, the University of Manitoba in conjunction with the Government of Trinidad and Tobago conducted four (4) professional development projects aimed at improving the teaching strategies of teachers working with children with special educational needs (Chee Wah, 1998). These were funded by the Canadian International Development Agency (CIDA) and the workshops attracted approximately 1,100 teachers from mainstream schools. This was seen to be widespread participation because it represented approximately one-tenth of the country's teachers.

The participants, many of whom had only a general understanding of pedagogy being 'diplomates' of the Local Teachers' Colleges. The interactive methods used ensured a deeper awareness of the challenges which existed in the classroom and recognised the need for more specialised information and support services. An abundance of resource material was shared with the groups who began using the North American and Canadian jargon associated with Special Education in the 1980s (Namsoo, 1998).

Nevertheless, participants felt empowered and the synergy experienced during the sessions motivated them further. Some went back to their schools with renewed vigour and convinced Principals that the Resource Room Concept could be successfully used for whole-school remediation. Other visited neighbouring schools on request and provided much needed support to teachers who wanted to try something new. Participants of this programme began to bond and a core group of co-tutors was identified to keep the national energy high by keeping in touch with each other and workshop participants to lend further support and find out what was new on the special education front (Namsoo, 1998).

Yet the programme also encountered problems. The workshops focused upon sensitisation rather than upon rigorous training and as such did not

adequately prepare teachers for working to improve the quality of education in the classroom. Though the projects had their own challenges, one must not underestimate the role which they played in the T&TUTA - University of Sheffield relationship. Their groundwork and intervention proved to be a very important catalyst to the developmental process.

Despite its successes, the end of project evaluation of the CIDA Project indicated that:

- ...1 The project is consistent with CIDA's objectives and priorities in terms of the development of human resources. It is also consistent with the goals and objectives of Trinidad and Tobago in Special Education.
- 7 The "Multiplier Effect" is not being implemented systematically
- 8 At the conclusion of this project, Trinidad and Tobago will not be self-sufficient in the delivery of Special Education.

and recommended that among other things:

...The Ministry of Education should consider collaborating with the University of the West Indies, TASETT and T&TUTA in harnessing resources and expertise that exist in Special Education in T & T for the delivery of Special Education.

(Palmer, November 1990)

Some of the co-tutors who were involved in the CIDA experience, capitalised on the strengths of this government initiative and began to develop locally directed teacher education programmes for teachers working with disadvantaged children in the mainstream schools.

The Marge Report

At the request of the Ministry of Education and sponsored by the Organisation of American States (OAS), Dr. Michael Marge conducted a survey on the incidence of handicapping conditions in children between the ages of 3 and 16 in Trinidad and Tobago. The Marge Report (1984) estimated there to be approximately 28,500 “handicapped” children whose educational needs were not being met within the society - the majority of whom would be present in the mainstream primary sector. It was acknowledged that collectively the ten special schools only catered to less than 5% of the children with special needs and there were insufficient trained teachers at these schools to meet even the needs of the students who attended them. In light of this situation, the Marge Report suggested “gradually adjusting the mainstream schools to meet the needs of those special children already in them” (Ministry of Education, 1985: 64).

It also recommended the setting up of “additional support services” (now referred to as Diagnostic Prescriptive Centres) staffed by specialists who would support the work of teachers in the mainstream. Though the government acknowledged the importance of the Marge Report by including the general findings and recommendations in the Education Plan (1985-1990), it still appeared hesitant to invest its funds in this area on non-economic return. While seeming acknowledging their

responsibility to provide “Special Education at all levels of the Education System” the Plan preceded that acceptance of responsibility by stating that the country “... must proceed with caution and seek alternatives which are educationally and socially acceptable, but which are not demanding on the public purse.” (Ministry of Education, 1985: 63).

T.A.S.E.T.T.

Meanwhile, the findings and concerns of the Marge Report inspired a group of co-tutors who were based in the Special Schools to become advocates for the provision of appropriate services for disabled individuals. In May 1985, the group calling itself The Association for Special Education of Trinidad and Tobago (TASETT) had its inaugural meeting at the Valsayn Teachers College. They set about developing refining their philosophy which was eventually translated into the regulations of the Association. Included in these were pledges:

- ...ii. To advocate for the provision of appropriate education for individuals with special needs.
- iv. To provide opportunities for on-going in-service teacher education.
- v. To promote public awareness of the nature of special educational needs and the rights of such individuals to an appropriate education.
- vi. To establish and maintain an effective and efficient resource base for the purpose of assisting educators (regular and special), special needs persons and the general public.

- viii. To collaborate with all relevant bodies to achieve the stated goals.
(Regulations of the Association for Special Education of Trinidad and Tobago, 1985)

Both on its own and together with other interest groups, TASETT has hosted several courses, workshops and micro-seminars throughout the country for parents, teachers and other interested professionals who interact and provide support for students and persons with special needs, written position papers and newspaper articles and developed other strategies to enhance teacher professional development. A Special Education Reference Library was also established in October 1989 in a room donated by the Valsayn Teachers' College to support the students of the T&TUTA - TASETT Certificate Diploma Programme in Special Education.

The T&TUTA - TASETT - University of Sheffield Teachers' Education Project

The relationship between the University of Sheffield and the Trinidad and Tobago Unified Teachers' Association had its genesis not in 1989 when the first cycle of the Certificate / Diploma course began but in the mid 1980s when a young special education teacher from Trinidad, Mr. Dennis Conrad, was a M.Ed. student at the University of Sheffield. He developed a comfortable rapport with Dr. Peter Clough one of his University lecturers and the relationship grew into a friendship.

After Conrad returned to Trinidad, he maintained a fairly close relationship with Dr. Clough. Considered by some as a visionary, Conrad, at the many diverse Special Education committee meetings he attended, frequently expressed the view that there was a growing need to provide recognised certificated courses for teachers in the field of Special Education. Based on the contents of the Marge Report (1984) and the then current down-turn of the Trinidad and Tobago economy it seemed as though there was an ever increasing population in the country who required special educational support. In his own words Conrad said,

The program was Conrad's (initially) response to the Education Plan (1985-1990) which in commenting on the Marge Report acknowledged the need for a drastic addressing of special education needs and personnel training but appealed for models less demanding on the public purse. Further and more specifically it also addressed the inadequacy of special education teachers; unavailability of credited, available teacher education in special education; optimization, and development of local resources.

The T&TUTA-ADE Link

It was therefore not surprising that in 1987, when the Association for Developmental Education (ADE) expressed an interest in co-hosting a workshop with a Special Education focus in July 1988, Conrad, under the portfolio of Conference Co-ordinator, contacted Dr. Clough and invited him as a visiting lecturer. T&TUTA was invited to be a partner in this teacher education venture and this added an astute political dimension to

the entire project. It presented the Teachers' Union with an opportunity, to visibly contribute to teacher professional development, and so provide necessary support, in an area which was not provided for, in the curriculum of the State funded tertiary institutions (the Department of Education of the University of the West Indies and the Teachers' Colleges). The Teachers' Union recognising that this was a worthwhile venture worked along with the ADE to mount this two-week workshop entitled "Teachers' Special Education Workshop" which focused on 'Curricular Strategies in Special Education.'

In attendance at the opening Ceremony, were the presidents of the host organisations, the Parliamentary Secretary in the Ministry of Education; and, the Minister of Education, who was also a Senator in the Upper House of Parliament addressed the assembled participants later in the day. The workshop clearly had the blessings of the government for National Alliance for Reconstruction (NAR).

The participants encouraged by this show of political support, attended their sessions delivered both by local and foreign personnel. The sessions were based on areas of interest identified by the participants of the recently conducted CIDA-University of Manitoba Sensitisation Programme.

The link was made between the two countries and Dr Peter Clough along with one of his colleagues from the University of Sheffield arrived to deliver sessions in:

- *Forward Trends in Special Education, Internationally,*
- *Curricular Approaches to Learning Difficulties, and*
- *Teacher Motivation*

Local personnel delivered sessions in:

- *Forward Trends in Special Education, Nationally,*
- *Remedial Strategies in the Teaching of Mathematics,*
- *Remedial Strategies in the Teaching of Language Arts & Reading*
- *Aetiology & Characteristics of Students with Special Education Needs - An Overview*
- *Management of Disruptive Behaviour*
- *Mastery of Learning and Teaching Model*

(Teachers' Special Education Workshop Brochure,
July 18th - 29th, 1988)

Since the main purpose of the project was to provide a service to teachers, participants were expected to pay a modest course fee to assist in defraying the expenses incurred. The entire venture was an overwhelming success with course participants being awarded a certificate of participation and clamouring for more. The following is an excerpt of the ditty entitled "Calypso Curriculum" written by Dr. Clough (aka The Mighty Mouse) and delivered at the close of the programme.

*So ah workin' hard
An' ah playin' hard
An' every day have twenty five hour
An' de Mighty Mouse
He in de Red House²
Walkin' de corridors ah power.*

*De Minister arkse
He say, "Tell meh ol' fox."
He ... Pantin³ to know de sum
Of de message ah bring;
An' to him I sing
My Calypso Curriculum.*

This gives a very clear indication of the mood of the course participants (lecturers and students) at that time. Everyone was hopeful that something positive was going to come out of the link made with Sheffield. Even at that time, great respect was given to the needs of the students and the focus was fondly referred to as the 'Calypso Curriculum'.

Educators began to realise that Special Education should be a concern of all people and it involved the delivery of quality education to all.

² Name of the House of Parliament in Trinidad and Tobago. It is positioned in the heart of the Capital, Port of Spain

³ Using the 'double entendre' of the calypso (folk song with social commentary), there is an intentional pun on the name of the Minister of Education at that time. His name was Clive Pantin.

Teachers and parents who once seemed voiceless had developed a voice and were able at that point to recognise and articulate that they needed more specialised training in special education. They were willing to be 'pioneering foot-soldiers' in a system which was at this point devoid of a developed support system for special education; and, were therefore encouraged to become members of organisations like TASETT and T&TUTASEC (T&TUTA's Special Education Committee). Participants' reasons for involvement could be mapped along a continuum, ranging from:

- *personal altruistic notions of how the education system could be enhanced,*
- *to the enhanced possibility of increased remuneration,*
- *to the acquisition of a stronger bargaining power within the education system,*
- *to simply, not wanting to be left behind on what seemed to be an exciting journey.*

This range of responses was collected during a debriefing session and also through the medium of an evaluation form on the last day of the workshop (July 29, 1988).

Subversive Activities

*We daily kill the plant and throw away the seed ...
There's a missing generation out there
Who cares
Find them, we gotta find them*

*They are dying disappearing everywhere
Who cares
Find them , we gotta find them ...
There's a missing generation
And soon if we do not find them
They're surely going to find us one day ...
And soon there will be no generation to care
(Ella Andell, 1997 Calypso - 'Missing Generation')*

This section is based entirely on memory and active participation in the events during that period. The political affiliations were quite significant. There was a core group of people who belonged to every 'worthwhile' association or organisation on special education which existed. They were in fact moving around in groups and calling themselves by different role titles according to which set of interests they were representing at the time.

For example, the majority of members of The Association for Special Education of Trinidad and Tobago (TASETT) were also members of T&TUTA's Special Education Committee (T&TUTASEC) and the Trinidad and Tobago Association for Retarded Children (TTARC). They ensured that they had established meaningful contacts in every department within the Ministry of Education and that they maintained a sufficiently high profile to ensure invitations to ALL the important meetings at the level of policy making. This was a 'teachers' education' revolution about to happen. They also knew that up to that point there was no 'elective' course of study offered at the Teachers' College which

dealt with Special Education. This was only introduced in 1988 and offered to a handful of students (maximum 10). I was one of those students.

A new breed of teacher-educator was emerging. Members of T&TUTASEC, TASETT and the Trinidad and Tobago Association for Retarded Children (TTARC) continued to voice their opinion that teacher education particularly in special education had been a particularly neglected area in Trinidad and Tobago. This group of advocates felt that if given the chance, they could use less money than that allocated to the CIDA project (approximately \$1mil.) and provide quality teacher education to a large enough group of teachers, which would result in them being awarded 'proper' certification which could be recognised internationally.

The Provision of Teacher Training in Special Education

Conrad, who was an executive member of both T&TUTASEC & TASETT was spurred on by the on-going success of the T&TUTA-ADE experience during the 1987/88 period. He therefore suggested to the executive members of TASETT that collectively they could design a tertiary level programme on special education which would suit the needs of the teaching population concerned with special education, employ local

experts to teach on course and seek validation from an external academic body. Joan Pedro, a former colleague of Conrad's and a former Course Director of the Certificate / Diploma Programme remembers that:

He [Conrad] went to the University of the West Indies with his proposal and it was turned down because of lack of funding and personnel etc. He got support from Dr Peter Clough from the university of Sheffield and also his colleagues in Trinidad, Mr Launcelot Brown, Ms Joan Pedro, and Mr Errol Pilgrim.

My notes from an executive meeting of TASETT in February 1989 suggested that the administrative procedures of the University of the West Indies did not allow for speedy responses to requests for new programmes and TASETT was adamant that the course should begin in 1989.

The behind the scenes programme planning continued and as the course outline increasingly became a reality, the group realised that they needed an established administrative centre to provide the stability for any possible relationship with a validating agency. Armed with positive feedback from the Special Education Committee of T&TUTA, the executive of TASETT took a decision to approach the executive leadership of T&TUTA with a proposal for joint management of a professional development course for teachers. Mr Launcelot Brown another former

colleague of Conrad's and a very active member of the Teachers' Union shared his memory of that incident:

The suggestion to go to TTUTA was my idea. I knew the executive very well, and I was well-respected in their circle. Sheffield needed a registered professional body for contractual purposes, and TTUTA fit the bill. Savitri Pargass, the then 1st. VP [Vice President] of the union had a keen interest in teacher professionalism and training, and seized the opportunity that would also have provided the kind of marketing that would have added to the profile of the union.

They convinced the executive officers of T&TUTA through negotiations with its president, Anthony Garcia, that collectively they possessed the necessary human, physical and administrative resources to successfully co-ordinate a comprehensive certificated programme in special education at the Certificate and Diploma Levels. After approximately 18 months of constant negotiations the groups agreed to advertise the programme which was carded to begin in July 1989.

As with all pioneering projects, some people especially hopeful participants supported it all the way, some elders from within the ranks of Special Educators and some Ministry Officials viewed on from the sidelines with scepticism, and others, were totally opposed to the idea. With a 'shoe-string budget' and a glimmer of hope, a group of young persons, forming themselves into a course co-ordinating committee,

worked virtually night and day for several months to put a course together (Namsoo, 1998).

An informal needs assessment was done based on the feedback from the recently completed CIDA project and the T&TUTA / ADE workshop of July 1988. Various prototypes, syllabuses and accountability systems were developed and lecturers wooed. It was a time of much excitement and eager anticipation. So determined was the group to make a positive impact, that they recruited the support of the best lecturers available on the islands - the Dean and other lecturers of the Faculty of Education, University of the West Indies; senior officers of the Ministry of Education. Senior advocates of special education and teachers who had special skills and experiences with working with children who had different disabilities were also invited to share their knowledge and experiences with the group of students. Using the Clough connection, lecturers from the University of Sheffield were also invited to conduct a vacation school twice a year and the University was approached to validate the course. For franchising purposes, T&TUTA was recognised as the local administrative body, though the course was taught by the members of TASETT and other suitably qualified persons who were subcontracted by that organisation.

July 1989 saw an enrolment of one hundred and ten (110) students for the first cycle of the Certificate / Diploma Programme in Special Education – such was the excitement and enthusiasm. Though there was some attrition, that first course settled to a healthy seventy-five participants within the first six months (Namsoo, 1998). To date, more than two hundred persons have successfully completed their course of study from six cycles of that programme.

The decision of a group of educators in 1987 to develop a Certificate/Diploma course in Special Education for interested teachers in the country was based on struggles around the interpretation and enactment of educational policy and the quality of provision of teacher professional education in the country. This was a project which sought to reconceptualise the meanings of social justice, human rights and the delivery of adequate educational services to children with special educational needs in a post-colonial society.

Expansion of the Programme

The Department of Educational Studies of the University of Sheffield had begun to develop a serious distance education profile in the late 1980s and early 1990s. In an interview with Dr. David Thompson, the current Chairperson of the Caribbean Programme Policy Committee (CPPC) and

long serving tutor on the various courses, he remembers Professor Neil Bolton, the former Director of the Division of Education Distance Learning Programme working together with Peter Clough to arrange validation for the first Certificate Diploma Course in Trinidad and Tobago. After that undertaking, the Distance Learning Unit became more firmly established.

Though the programmes were developed by the Department on a relatively small-scale, the expansion in several other countries including Hong Kong, Singapore and Dubai ensured that they began to be recognised for outstanding achievements in the area of in-service teacher education. At present, distance education accounts for a great proportion of the department's work (Armstrong & Namsoo, 2000: 209).

Though the programmes in the various locations differed in significant ways, the strength of the offerings was:

characterised by pedagogical diversity (which included face-to-face study schools, local tutorial support networks and specially produced distance education materials) and by an attempt to develop curricula with both an international and local relevance.

(Armstrong & Namsoo, 2000: 209)

In the Caribbean, in particular, the relationship had developed as a result of an on-going consultative-collaborative approach to teacher education

which was "...firmly rooted in the on-going discourse between teachers and their organisations and the University" (Armstrong & Namsoo, 2000: 209). Dr. Thompson reflecting on the original relationship with T&TUTA, thinks that it was a strength because it was quite similar to the relationships that the University had with Local Education Authorities in Sheffield. He explains that they are in fact still running courses with them where they all collaborate in the design of the curriculum.

In 1992, the relationship deepened further, when the needs were expressed by the local Management Team, of which I was a member, for the establishment of a Master Level Course in Special Education. In January 1993, the University of Sheffield, with T&TUTA, as its administrative agent in Trinidad and Tobago, accepted the first cohort of thirty-three students to the Masters' Programme in Special Education using a distance learning approach (Namsoo, 1998).

Dr Thompson explains that though the University was interested in setting up the Masters Course, they "... did not want to do things that the Local University, UWI should and could be doing". He says,

"we did not want to get into a situation of being in competition with UWI at all. So it was only when the Union (T&TUTA) said specifically that we want you to do these programmes which UWI is not doing and is showing no signs of doing that the

University stepped in. We never claimed that we could do it better than UWI."

He also remembers that Professor Bolton and himself made some of the earliest contacts with the Dean of the Faculty of Education, Mr. Carol Keller and Professor Durojaiye to explain their concerns about being seen to be in competition with the local institution. Dr. Thompson further explained that the courses in the Caribbean were established differently from the courses in the different distance learning locations which were "*...more obviously classical higher education markets with different universities actively competing for specific groups*".

A second course with a cohort of twenty-six students was completed in June 1998. By July 1988, the University of Sheffield had now added two other programmes to its collaborative repertoire with T&TUTA:

- another Distance Education Masters' Programme in Educational Studies; and,
- a "remote location" Doctor of Philosophy Research Degree Programme, the first of its kind to be offered by the University outside the UK.

In October 1998, the programme sprouted another enhancement in the form of a centre for *Research and Professional Development* which was

launched in Trinidad and Tobago. It was a joint venture between the T&TUTA and the University and sought to enhance the provision of teacher education and further sustain a culture of research within the country. However, an expansion in the University's collaborations across the Caribbean, into areas of professional education which extended beyond the formal context of schooling had introduced opportunities for broadening alliances within the region. As a result of this, in June 1999, the Caribbean Institute for Research and Professional Education was established as an agency of the Department of Educational Studies of the University of Sheffield with its office in Port of Spain, Trinidad. T&TUTA was invited to be an active player but declined the offer.

The new Caribbean Institute for Research and Professional Education (CIRPE) aimed to "promote high quality educational research and professional development in the Caribbean" through, among other things, "... providing opportunities for long-term research-based professional development, ... providing a forum for educational debate, ... disseminating research outcomes through ...magazines and bulletins" in the region (CIRPE Report, June 1999). Since then, CIRPE has launched a Distinguished Lectures in Education Series in July 1999 in Trinidad and co-ordinated a Conference on 'Rethinking Teacher Professionalism in the Caribbean Context' in St. Lucia in January 2001.

In 1997, the University was invited by the Teachers' Union of St. Lucia to begin a Masters of Education course in Educational Studies in St. Lucia. After two years of discussion with the Union and some negotiations over the curriculum content and the method of assessment of the course with the Ministry of Education, approval was granted and the first cohort of students began the programme in July 1999. Those who have gone on to the Masters will be submitting their dissertations in October 2001.

Initially, the main impetus for change came from teachers working collectively through The Association for Special Education of Trinidad and Tobago and the Special Education Committee of T&TUTA to address the shortage of trained teachers in the area of special education. The process of this struggle contributed to sustaining the momentum and vitality of a shared vision. This vision was part of a self-liberating movement where teacher-participants were encouraged to become reflective practitioners in the process of self-empowerment. Quotations from other students later on in the thesis further illustrate this point.

The pioneering group (course participants as well as the management committee) recognised that long sought after change in education was not coming from the technocrats and the bureaucrats of the Ministry of Education but from the creativity and effort that was generated by the

struggle for social justice and rights. Thus began a revolutionary thought of changing schools; and, by extension, the education system from within. With the new tools of education, came liberation for some and children who were probably 'faceless bunches' in the schools were now recognised and included in the processes of change and learning (Namssoo & Armstrong, 2000).

On the ownership of the course(s)

Dis course is about WE - de Caribbean People⁴. Dr. Clough in 1991 brilliantly captured the mood of the first cohort of students on the Certificate / Diploma in Special Education Course, in this poem written in the Creole dialect of Trinidad. Students felt so very empowered because they had persevered with a course against all odds and with minimal support from the Ministry of Education. (See over)

DISCOURSE (DIS COURSE)

Mistah Moderatah, Honey?
Yuh gotta minute, hmmm?
Ah hear, yuh arksin' 'bout dis course, 'ent?
Well listen to meh, one time.

Dis course ...
Is not Conrad, Is not Ministry,
Is not Pargass, Is not Faculty,
Is **We** course!
Mistah Moderatah,
Dis course, **We!**

⁴ Translated into "This course is about US - the Caribbean People".

Yuh know Mistah Moderatah
 Dis course ain't no lime.
 Dis course take plenty ah time.
 An' plenty ah time ah man wife say,
 "Oh honey, please don't go today."
 An' plenty ah time meh one man say,
 "Yuh not leaving dis house today!"
 An' it harder still when meh small chile say,
 "Mammy, if yuh ent help meh now
 Den, what little chance
 Ah have to pass
 Meh Common Entrance?"

Dis course..
 Is not Pedro, not Pilgrim,
 Not Clement, not any ah dem 'ting,
 It not Senah, not Keller,
 Not Durojaiye -
 Doh dese all good fellah ⁵-
 Is we course, Mistah Moderatah,
 Dis course, **WE!**

Oh an' Professah Barton⁶,
 Ah hear yuh sayin'
 - What's it, now? -

 "Education is a fight, Fuh de right
 Ah dem who does live in de night
 To see de light...!
 Is dat right?"

Well listen! We not fright!
 We not physically scarred
 Nah mentally marred.
 But we - how yuh say?
 We winning dis day,
 Doh de battle hard.

An' when ... Ah could call yuh Len?

⁵ Refers to Lecturers on the course: Joan Pedro (Special Educator), Errol Pilgrim (Senior Special Educator), Moislie Clement (Senior Special Educator), Kwaku Senah (Lecturer at UWI), Carol Keller (Dean of the Faculty of Education , UWI), Professor Michael Durojaiye (Professor of Education at UWI)

⁶ Refers to former Head of Department, Professor Len Barton

... Yuh walking de corridors o' intellectual power
In Sheffield, an' a fellah say,
"How're you doing old chap?"
 "Not so bad?"
"How's our course in Trinidad?
An' you say,
"Ha! Is not your course, yuh stuff turkey!
Is not Sheffield!
 Is not Clough,
 Is not regulations,
 Is not any o' dat stuff..
 Is dem course, Mistah English Academic,
 Dis course **DEM!**"

Anyway is time to go,
It late in de day
Ah gotta write ah essay
An' ah think ah say it all now...
Oh 'cept one 'lil 'ting,
Mistah Moderatah...
Maybe yuh could do meh a 'lil favour? Eh?
Maybe yuh could gimme a 'lil flavour? Eh?
Of de final examination paper?

*** Notes from the Course Moderator's Diary on the pioneering
TTUTA-TASETT-University of Sheffield Special Education
Project (1989 - 1992)

Trinidad and Tobago, July, 1991.